ConnectingGTA Provider Portal User Guide for Site Trainers and Site Help Desks

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Getting Started

Introduction

The ConnectingGTA Provider Portal displays content from sources across central Ontario in a single web browser window, on tabs and pages. This data, which includes patient demographics, visit and encounter data, documents, reports, diagnostic imaging results, lab data from the Ontario Laboratories Information System (OLIS) and information from the community sector, is all displayed together in a single portal.

The ConnectingGTA program team has worked to optimize the portal to meet the needs of the region. Given the vast range of providers utilizing the portal, each user can customize their views to meet their needs.

This guide outlines the functionality available in the R3A Release of the portal. Functionality will continue to evolve and expand as the program moves into a full go live.

All examples and screenshots contained within this guide are simulated with mock data; no real patient data is present.

Accessing the ConnectingGTA Provider Portal

Users must access the portal through their local Health Information System (HIS), or through One ID.

All activity performed by users in the portal is logged and the eHealth Ontario Electronic Health Record (EHR) privacy and security policies require regular audits to be run by privacy officers and the ConnectingGTA program team to validate that the system is being used only for providing or assisting in the provision of healthcare.

Browser Considerations for ConnectingGTA

As of June 2015, TELUS is fully committed to supporting access to the ConnectingGTA Portal on Internet Explorer (IE) versions 8 and 9, and Chrome (Version 39). These browsers are at present undergoing rigorous testing to ensure compatibility.

Users of Internet Explorer 8 must turn off Compatibility Mode via the browser's Tools menu. It is safe to dismiss any warning messages that appear as a result of Compatibility Mode being turned on.

For sites currently using Internet Explorer 9 and 10, access to the Provider Portal should be available. However, some anomalies may arise while using Internet Explorer 9 or 10 that the Program has not yet been in a position to test and verify. If an anomaly is encountered, please contact your help desk.

HIS Login Instructions

Users will have one or more ConnectingGTA icons or links embedded in their HIS system. Users can click on the ConnectingGTA icon/link to get to portal. The physical representation of the link varies greatly from site to site. Users should reference their site's documentation.

An assertion of the user's identity and authorization will be passed to the portal. If a user is viewing a patient's record in their HIS, clicking on the ConnectingGTA button will open the portal directly to the patient's information (patient context is passed to the portal).

ONE ID Login Instructions

The user will access the portal through One ID via a URL (https://portal.connectinggta.ca/pe/p/ql). Users must click on the **Provider Portal Login** button on the ConnectingGTA Landing Page.

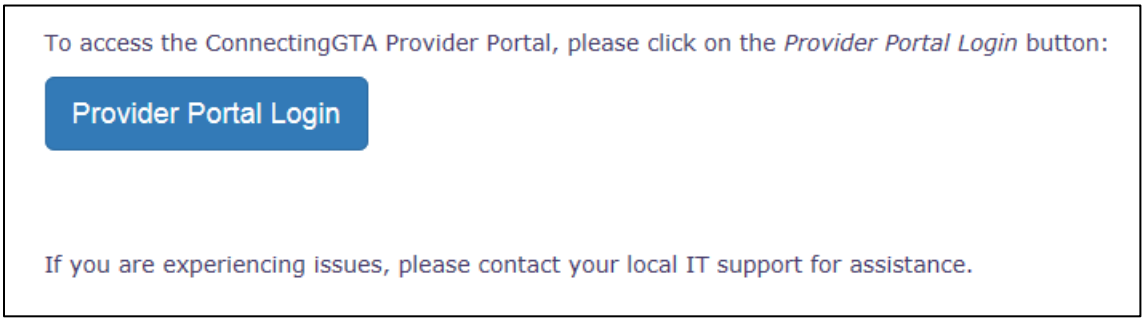

To access the ConnectingGTA Provider Portal, please click on the *Provider Portal Login* button:
Provider Portal Login
If you are experiencing issues, please contact your local IT support for assistance.

Figure 1: ConnectingGTA Landing Page

Users must access the portal with their ONE ID credentials:

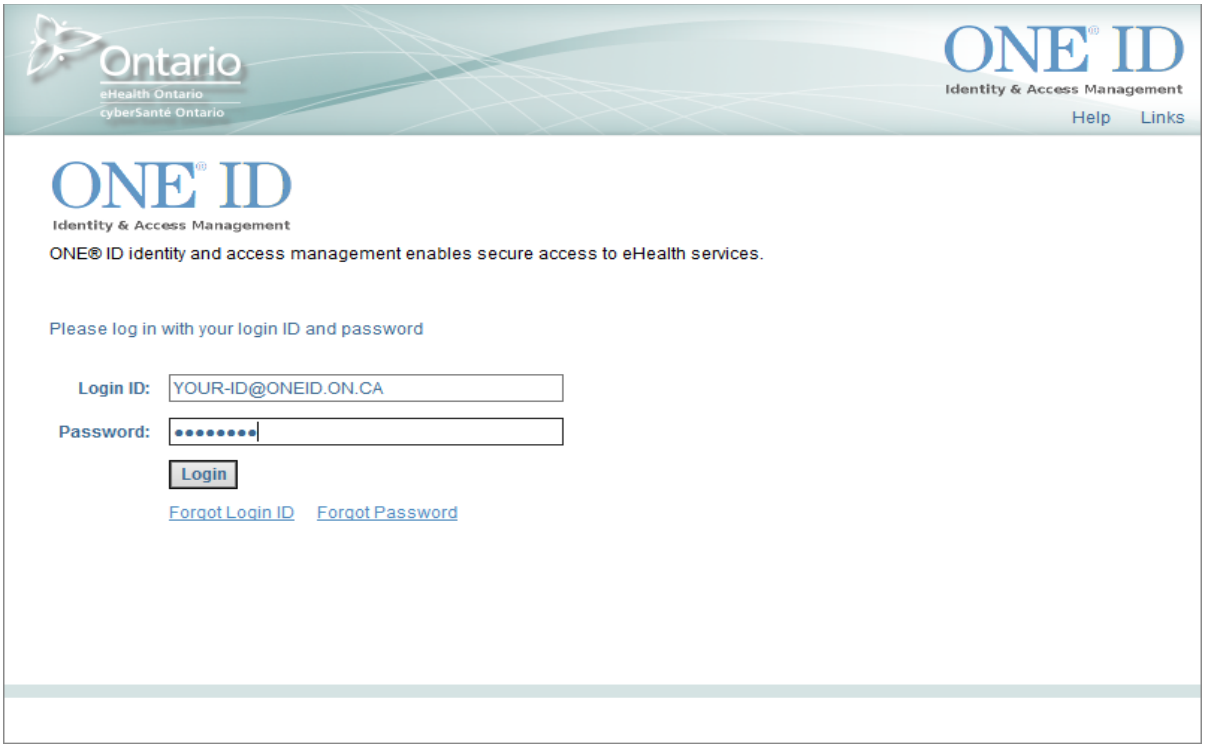


Figure 2: ONEID Login Page

Users may also be asked to verify their identity after entering their login ID and password by answering security questions.

Once a user has been recognized, the user must select the organization under whose authority they are working:

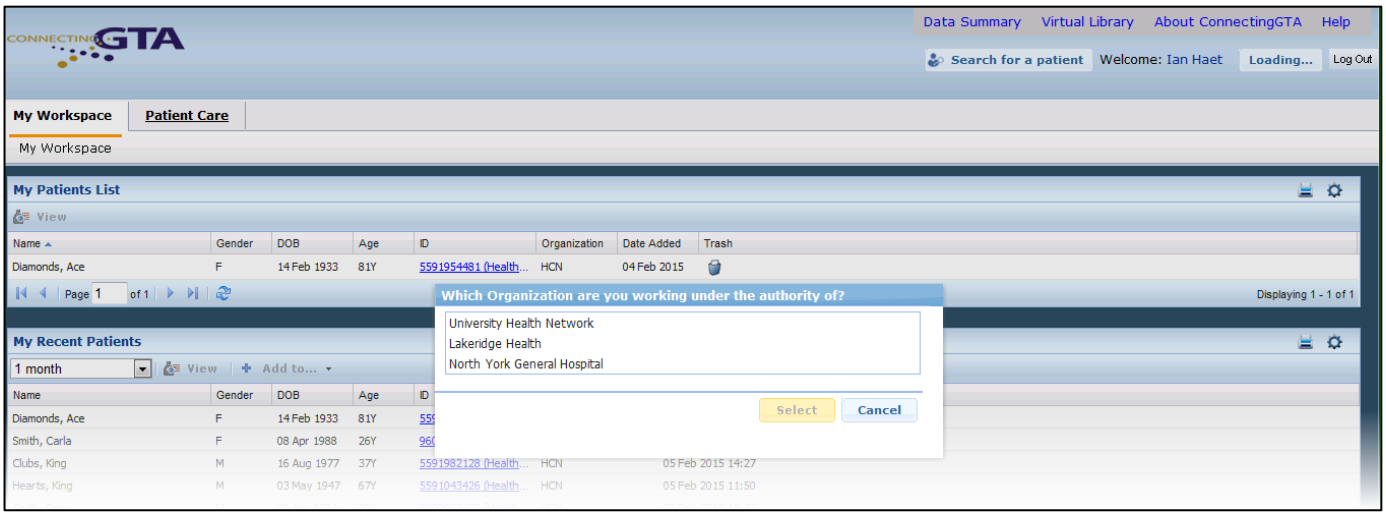


Figure 3: Dialog to Specify the User's Organization

If the user has authority under only one organization, they will by-pass the selection prompt.

Accepting the End User Agreement

Users must accept the eHealth Ontario End User Agreement the first time they access the portal.

Figure 4: Notice that End User Agreement has not been Accepted

The user must re-agree to the EUA annually, or whenever a new version of the End User Agreement is published.

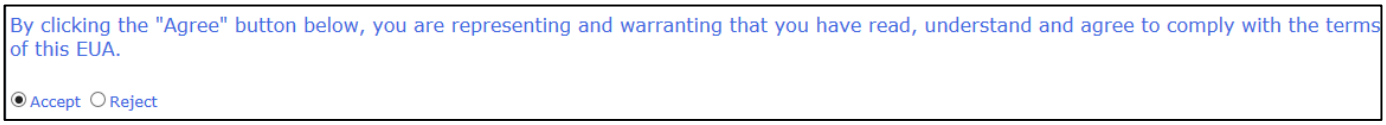

By clicking the "Agree" button below, you are representing and warranting that you have read, understand and agree to comply with the terms of this EUA.
Accept
Reject

Figure 5: End User Agreement Options

Landing in the ConnectingGTA Provider Portal

If a user accesses the portal from their HIS with no patient selected (also referred to as 'no patient context') or using their ONE ID credentials, they will land on the My Workspace tab. Users can search in the portal for the patient using the 'Search for a patient' feature (Select a Patient).

If a user accesses the portal from their HIS with a patient selected, they will land directly on the Patient Care tab with the selected patient's data visible (patient is in context).

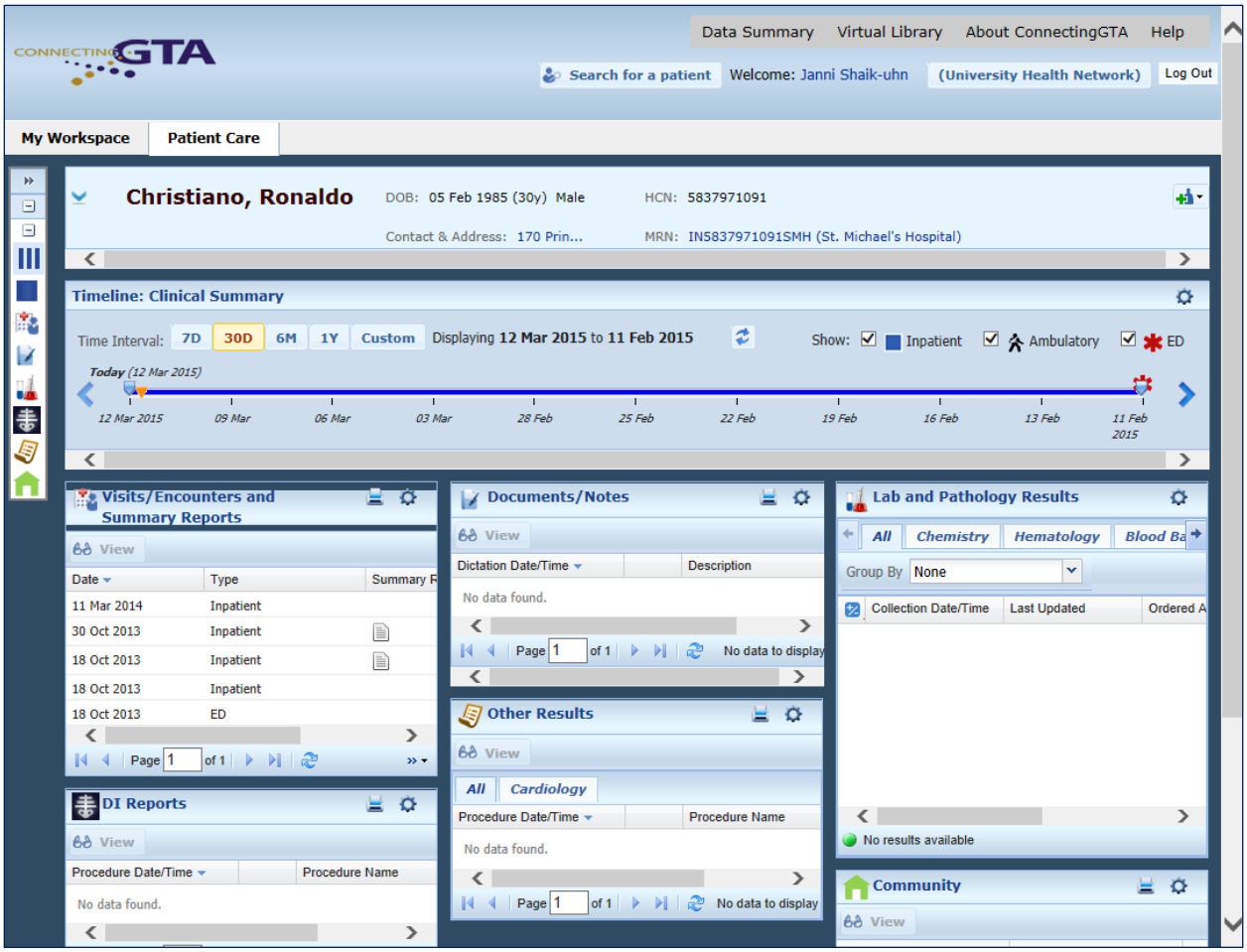


Figure 6: Patient Care Tab Landing Page

Note: If no match is found for the patient in the portal, users will land on the Patient Care tab. Error messages will display to indicate that no match has been found. Users can search in the portal for the patient using the 'Search for a patient' feature (Select a Patient).

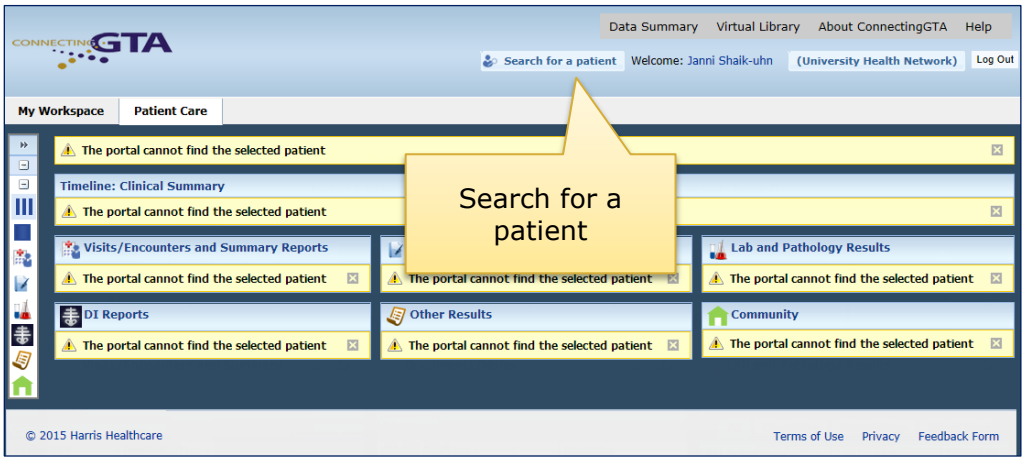


Figure 7: Patient Care Tab Landing Page, with Error

Log Out and Time Out

To exit the portal:

1. Click on the Log Out button.

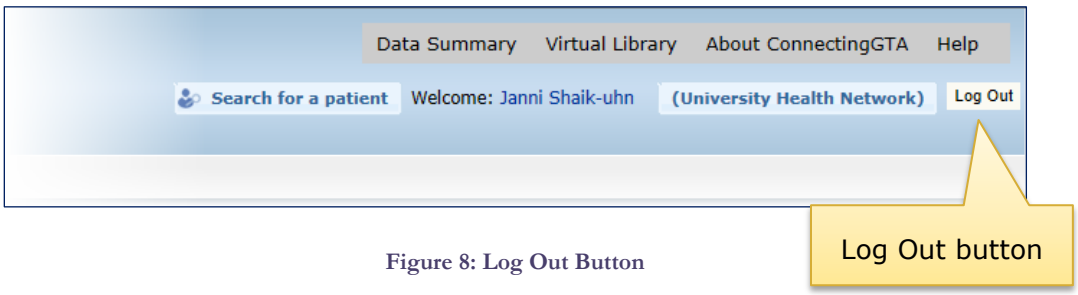


Figure 8: Log Out Button

2. After logging out, the user will land on the portal Log Out page and can close the Internet browser window. The user must close all browser windows to be fully logged out of the system.

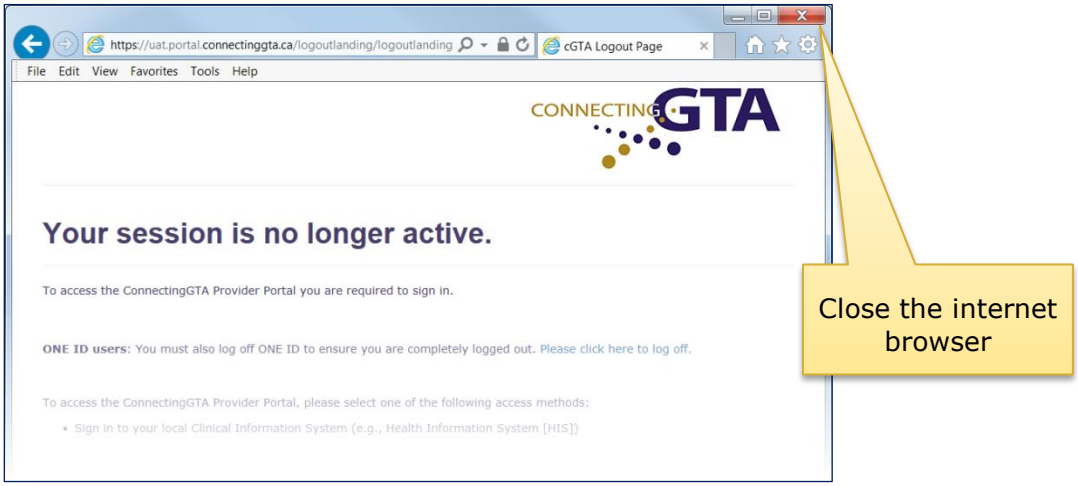

https://uat.portal.connectinggta.ca/logoutlanding/logoutlanding
cGTA Logout Page
File Edit View Favorites Tools Help
CONNECTING GTA
Your session is no longer active.
To access the ConnectingGTA Provider Portal you are required to sign in.
ONE ID users: You must also log off ONE ID to ensure you are completely logged out. Please click here to log off.
To access the ConnectingGTA Provider Portal, please select one of the following access methods:
Sign in to your local Clinical Information System (e.g., Health Information System [HIS])
Close the internet browser

Figure 9: Log Out Page

Note: ONE ID users must click the **Please click here to log off** link on the Log Out page to fully close their active ONE ID session.

The user will be automatically logged out of the portal after 15 minutes of inactivity, or after the user's active session exceeds 8 hours.

3. A warning message to extend the session is displayed before the session times out. If the user wants to continue working, click Continue Working.

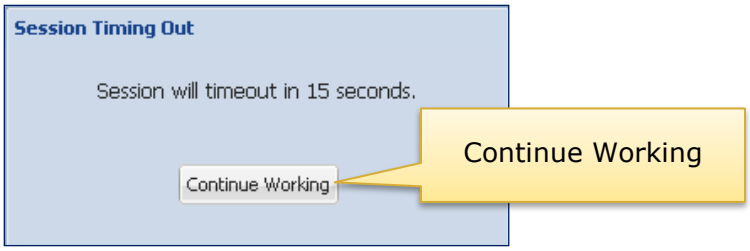


Figure 10: Session Time Out Warning

4. After the session is logged out, the user will land on the portal Log Out page and can close the Internet browser window.

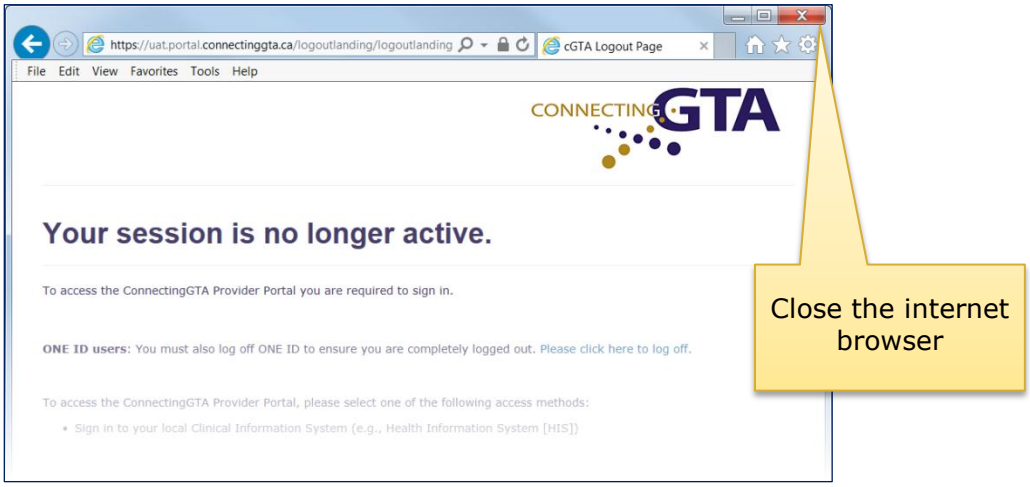

https://uat.portal.connectinggta.ca/logoutlanding/logoutlanding
cGTA Logout Page
File Edit View Favorites Tools Help
CONNECTING GTA
Your session is no longer active.
To access the ConnectingGTA Provider Portal you are required to sign in.
ONE ID users: You must also log off ONE ID to ensure you are completely logged out. Please click here to log off.
To access the ConnectingGTA Provider Portal, please select one of the following access methods:
Sign in to your local Clinical Information System (e.g., Health Information System [HIS])
Close the internet browser

Figure 11: Log Out Page

The portal Log Out page's main functionality is to inform the user that the session is no longer active.

- Users cannot reopen the portal from this page – they must return to their HIS or the ONE ID Login Page
- Users can click the "Please click here to log off" link to end their One ID session as applicable
- Users can close the browser or navigate to another webpage

Note: Logging out of the application the portal was opened from (e.g. HIS) does not affect the logout process for the portal.

Working with the ConnectingGTA Provider Portal

The basic layout of the portal window is illustrated in the following sections.

ConnectingGTA Provider Portal Window (Portal Framework)

On the My Workspace tab, the portal can be broken down into three components:

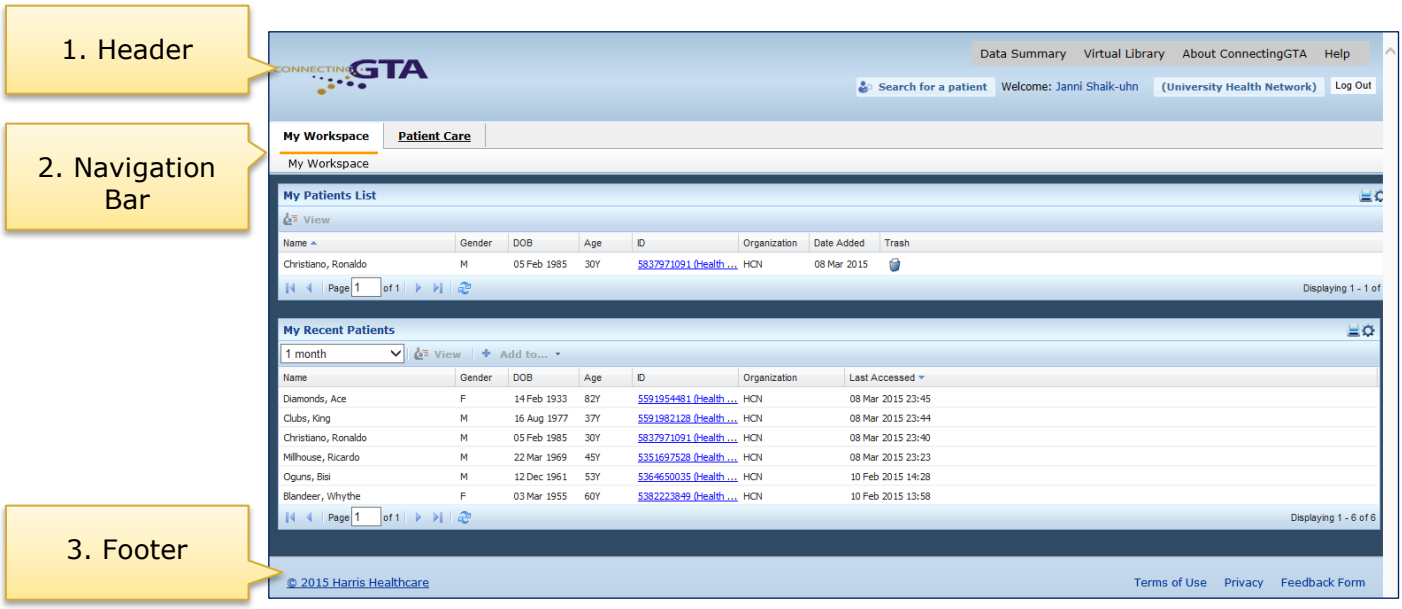


Figure 12: Portal Framework, My Workspace Tab

On the Patient Care tab, the portal can be broken down into six components:

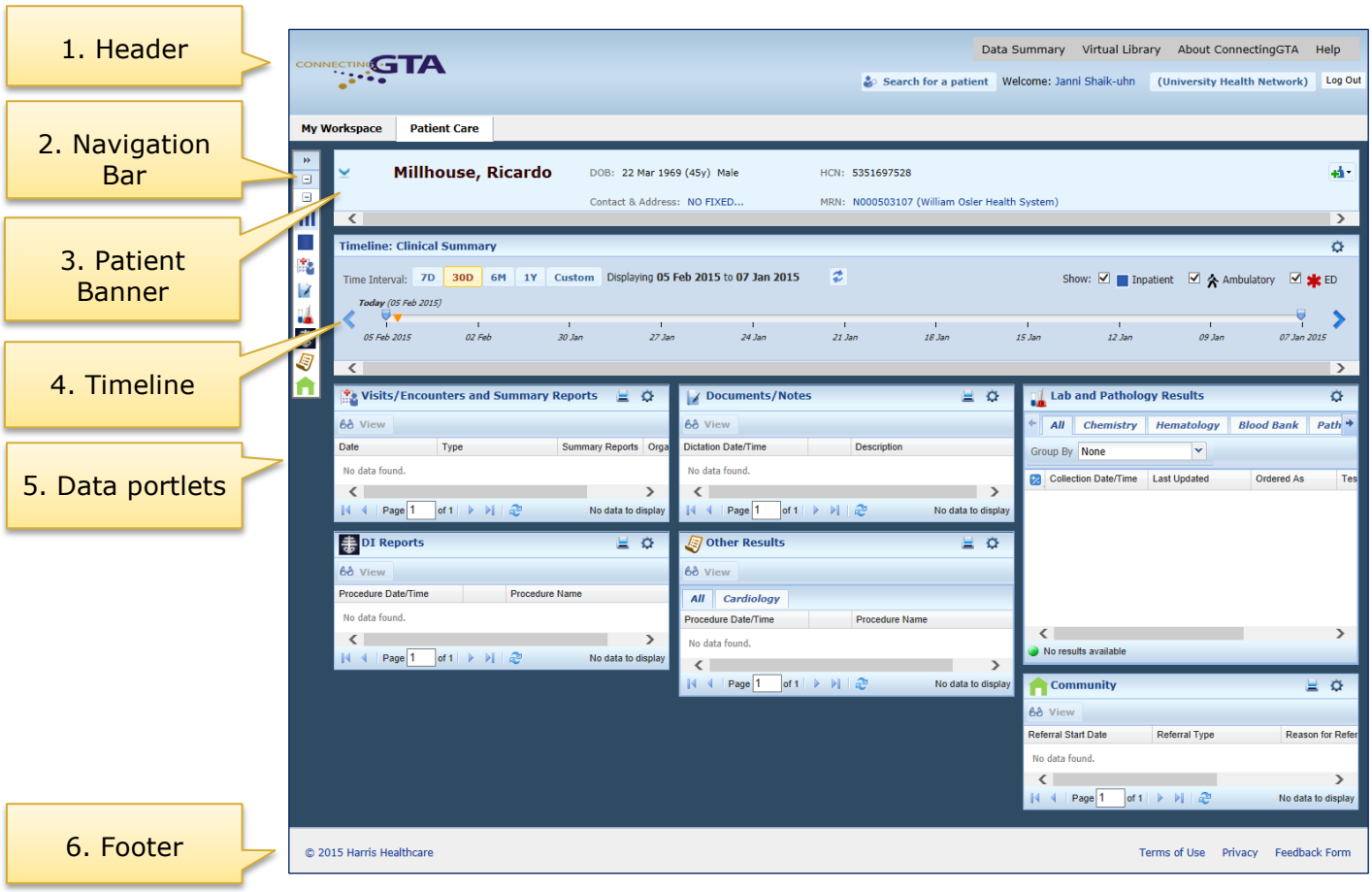


Figure 13: Portal Framework, Patient Care Tab

Header

The portal header is available throughout the portal.

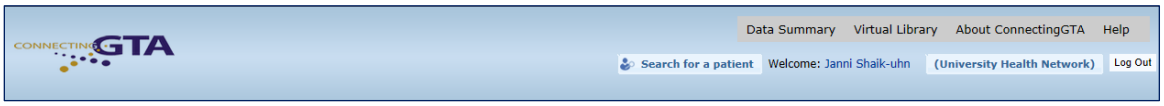


Figure 14: Portal Header

Component	Description
Logo	ConnectingGTA program logo
Patient Search	Refer to Patient Search section

External Links	Clicking on a link in the header will open a new internet browser tab or window (depending on browser being used) to display the linked content. There is no association between the content within the external link and the portal. This includes access to: ConnectingGTA program Data Summary (outline of data availability for all ConnectingGTA sites sending data to the CDR and OLIS) Links to professional organizations (e.g., CPSO) Links to information about ConnectingGTA (e.g., Collabspace, eHealth Ontario, Canada Health Infoway, MOHLTC, LHINs) Link to Help content
User Name	The user's first name and last name (as provided from the source system) will display.
User Organization	The Organization from which the user has logged into the portal from will display (e.g., University Health Network).
Log Out	Clicking on this link will log the user out of portal (Log Out).

Navigation Bar

The portal has two tabs, My Workspace and Patient Care.

The Patient Care tab has a navigation bar, which will be displayed in one of two views: collapsed or expanded. The collapsed view shows only the icons, but the titles are available by allowing the cursor to hover over the icon. The expanded view includes the titles associated with the icons

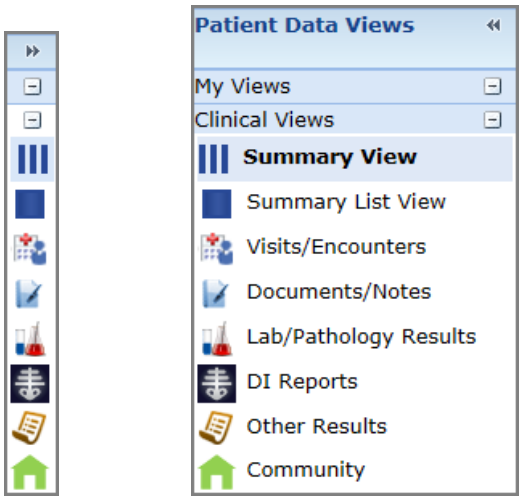


Figure 15: Portal Navigation Bar, collapsed and expanded views

The pages associated with each part of the navigation bar is listed in the following table:

Page	Quick Description
Summary View	Grid view of all six portlets in a condensed format
Summary List View	Consolidated view of all six portlets in full format
Visits/Encounters	Display of visits and encounters and summary reports
Documents/Notes	Display of non-diagnostic documents and notes
Lab/Pathology Results	Display of lab and pathology results provided through OLIS
DI Reports	Display of diagnostic imaging reports
Other Results	Display of other diagnostic results
Community	Display of community data, including CCAC referrals

To move between the different tabs and pages of the portlet:

1. From the current view, locate the Navigation Bar.
2. Click on the page of interest.

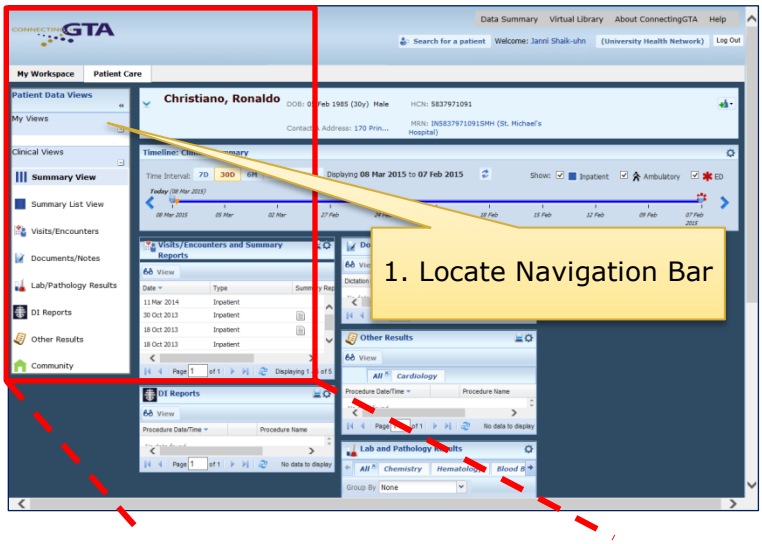


Figure 16: Using the Navigation Bar

3. Land on selected view.

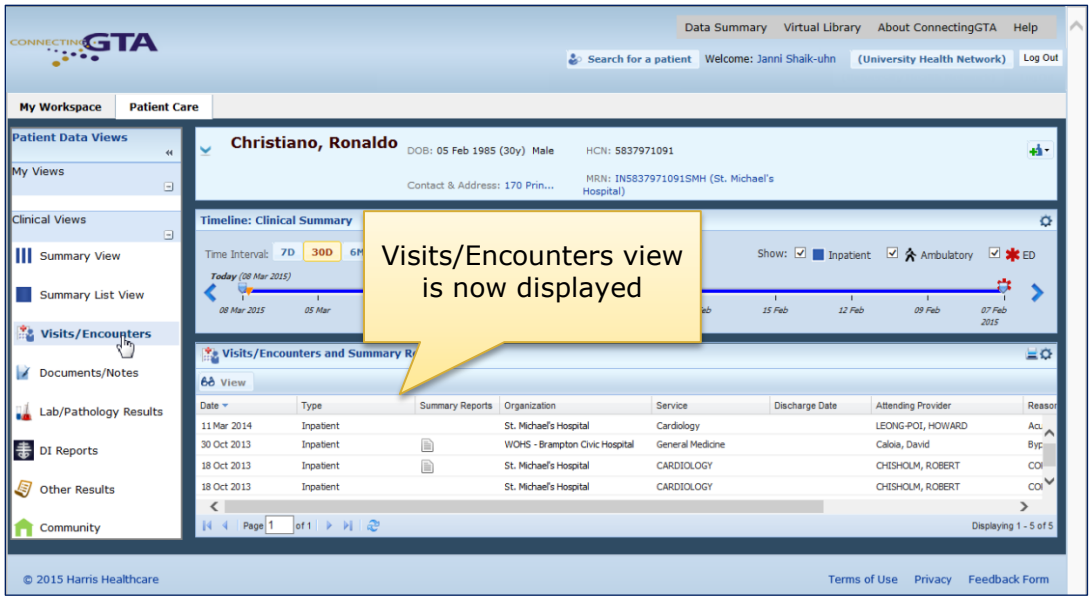


Figure 17: Using the Navigation Bar, Different View

Footer

Access to ConnectingGTA program information is available in the footer links. This includes:

- Terms of Use
- Privacy
- Feedback Form

Figure 18: Portal Footer

Click on any link to open a new Internet window or tab with the selected content.

General Navigation

Within the portal there are portlets, which group together meaningful categories of data. There are multiple ways of viewing the same portlet:

1. Condensed view of the portlet on Summary View page

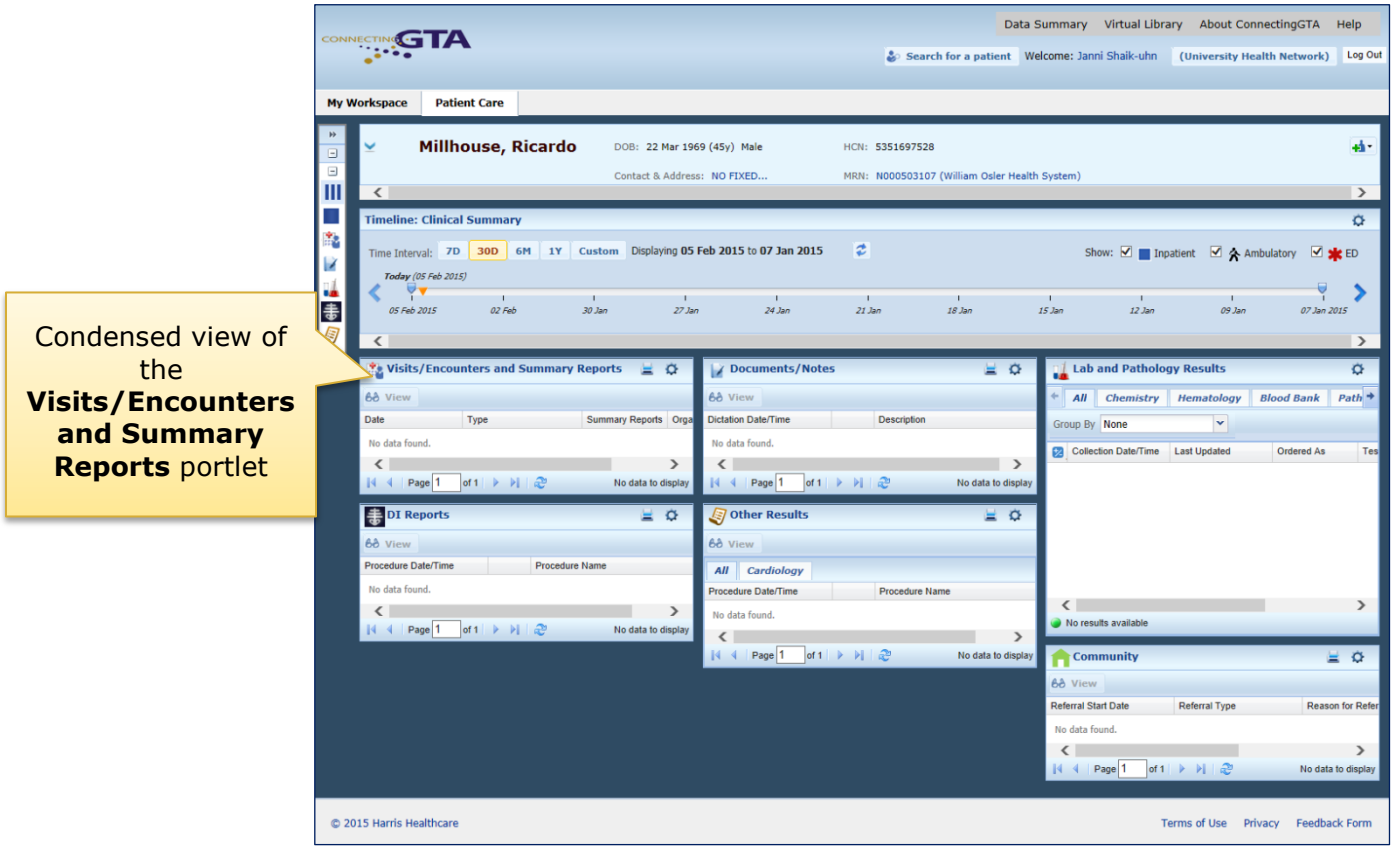
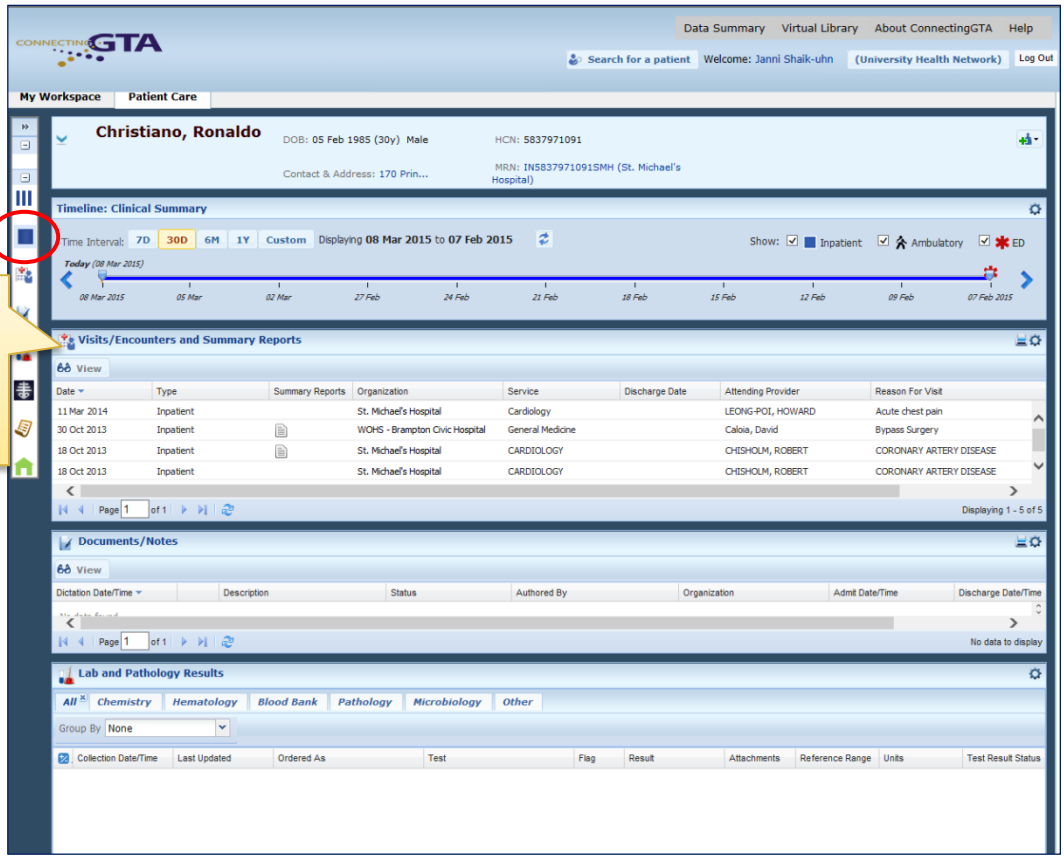
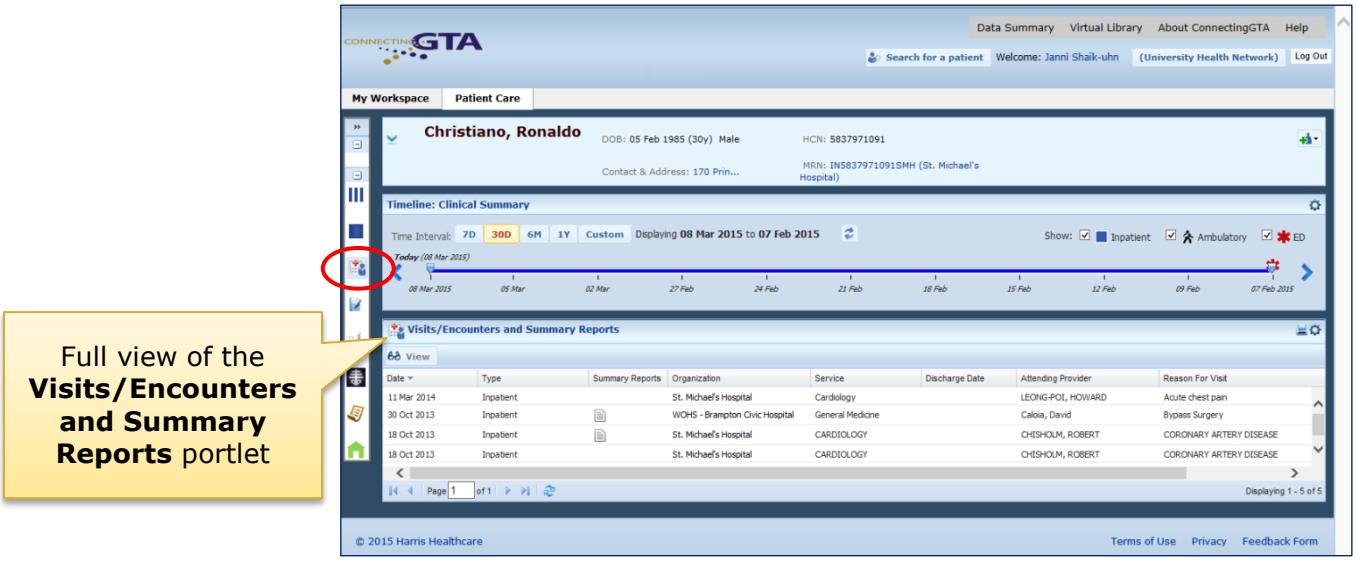


Figure 19: Condensed Portlet View

2. Full view of the portlet on Summary List View page



3. Full view of the portlet on the associated portlet page (e.g., Visits/Encounters and Summary Reports page)



Use the Navigation Bar to move between views.

The following sections describe on how to navigate and adjust the view of the lists that reside within the portlets.

Paging

Paging controls appear at the bottom of patients lists (e.g., My Patients list) and data lists (e.g., Visits/Encounters portlet).

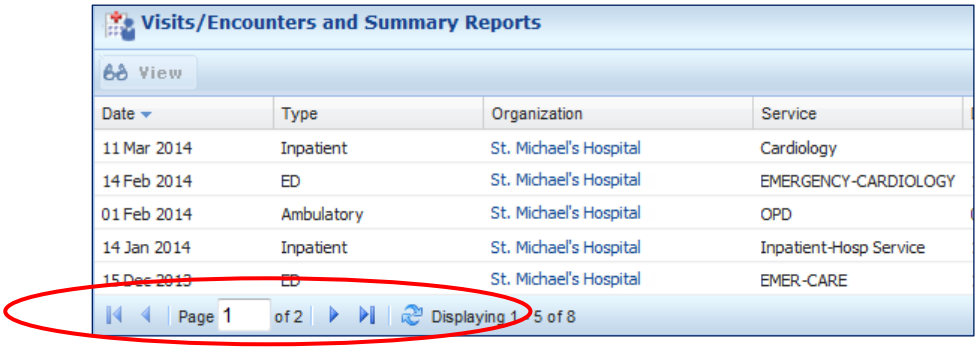


Figure 20: Paging on Portlets

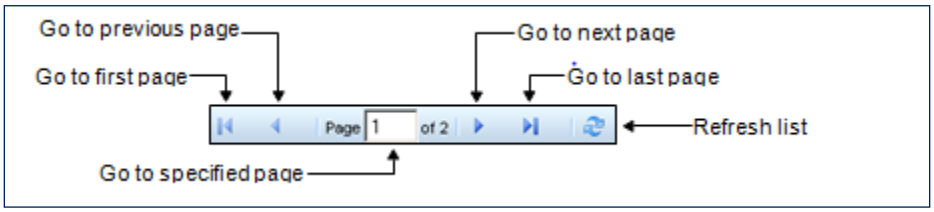


Figure 21: Paging Button Overview

Click an arrow to move in that direction, or change the page number and press Enter on your keyboard to go to a specific page.

The number of rows that appear by default (before paging begins) depends on what type of portlet is being used, here is a summary:

Portlet	Default Number of Rows
Visits/Encounters and Summary Reports	5
Community	5
Documents/Notes	10
DI Reports	10
Other Results	10
Lab	N/A
My Patients List	10
My Recent Patients List	10

Table 1: Default Number of Rows in Lists and Portlets

Paging applies only when there is more than one page of data. If there is only one page of data, the controls appear but are disabled. Likewise, controls are disabled when there is no more data in that direction (e.g., 'Go to previous page' is disabled on Page 1).

Note: paging is not employed in the Lab and Pathology Results portlet.

Data Refresh

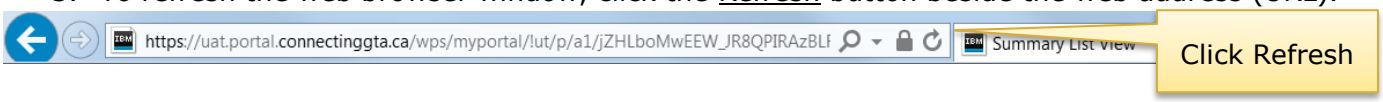
1. To refresh the list or portlet, click the Refresh button beside the paging controls.

Figure 22: Portlet Refresh

2. To refresh the portal, click the Refresh button beside the Timeline.

Figure 23: Timeline Refresh

3. To refresh the web browser window, click the Refresh button beside the web address (URL).



Managing List Columns

A user can quickly change display properties of most lists. When a list of items is first displayed, the system uses the defaults as configured by the administrator. Changing display settings as described below are temporary and will not be saved when navigating away from the page. To make a change that persists, see the User Preferences.

Temporary preferences available are:

- Adjust the column width
- Hide or display columns
- Sort the list by most columns in ascending or descending order
- Filtering data in columns

Column Width

When a value is too long to fit within the column of either a patient list or portlet data list, an ellipsis (…) appears in the column to indicate there is additional data. To see more data or simply adjust the size of the column:

1. Hover the pointer over the right edge of the column heading until the ↔ adjuster appears. Click and drag the adjuster left or right.

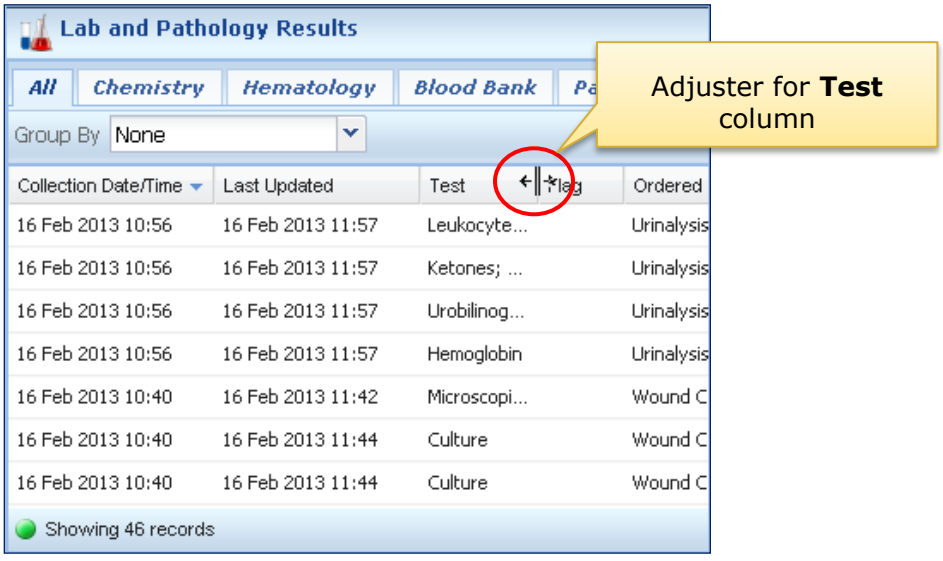


Figure 24: Adjusting Column Width

Hide or Show Columns

To temporarily hide or show columns in a portlet:

1. Hover the pointer over any column header until the drop down arrow ▼ appears. Click on the arrow to display the menu.

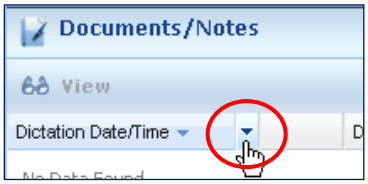


Figure 25: Drop Down Arrow

2. Hover over Columns to show the columns list.
3. Un-check/check the boxes to hide/show the desired columns in the list. Click anywhere outside the menu to close.

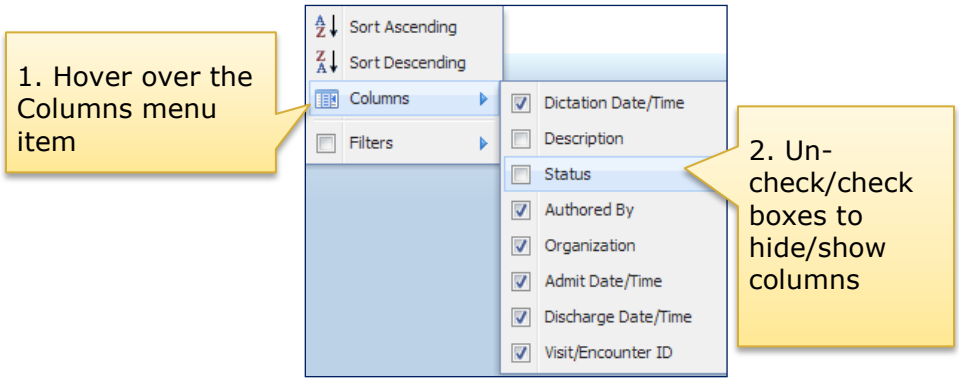


Figure 26: Columns List

Note that some columns, as defined by the ConnectingGTA program, cannot be hidden from the list display – they will appear visibly disabled.

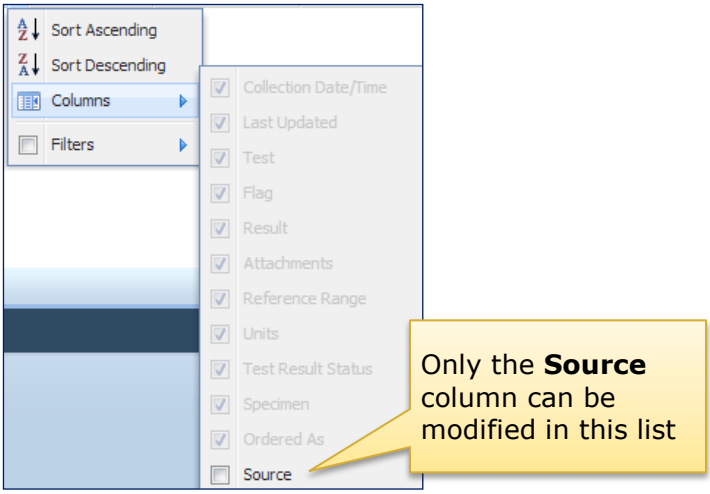


Figure 27: Locked Columns

Sorting

When first displayed, list data will be sorted by the specified default column in either ascending or descending order. This is identified by a small arrow in the specified column header.

To change the sort direction, or sort on a different column, use either of the following methods:

A. Click the column heading, which sorts the column in ascending order. If the column is already in ascending order, click the column heading to sort the column in descending order. In other words, clicking the column heading acts as a toggle to sort between ascending and descending order.

B. Using the menu:
   1. Hover the pointer over the column header until the ▼ drop down arrow appears.
   2. Click on the arrow to display the preferences menu.
   3. Select to either Sort Ascending (A-Z and 0-9) or Sort Descending (Z-A and 9-0).

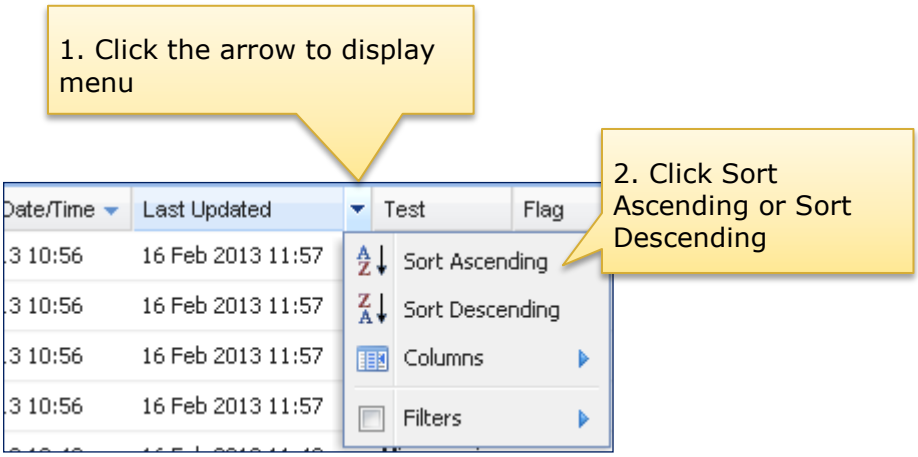


Figure 28: Sorting

Filtering (Apply a Filter)

On columns where filtering is available, the data within the column can be filtered to show only certain types of data. If the column allows filtering, it is available from the preferences menu in the column header.

To filter a column:

1. Hover the pointer over the column header until the drop down arrow ▼ appears.
2. Click the arrow to display the preferences menu.
3. Hover over Filters to show the filter selection list. The type of filter available will be dependent on the data type of the column: Date, Age, Free Text or Selection.

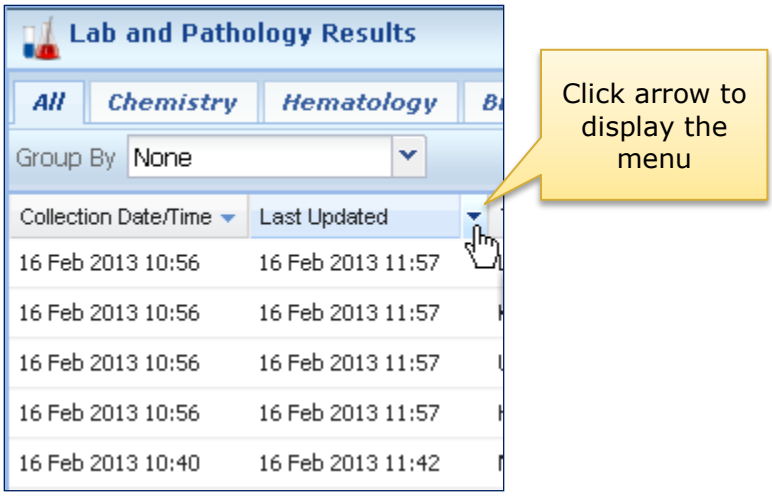


Figure 29: Drop Down Arrow

Note: Filters can be applied to multiple columns at the same time.

A. Date Filtering

This method is used for any column containing date data:

1. Hover the pointer over Before, After or On to display the calendar.

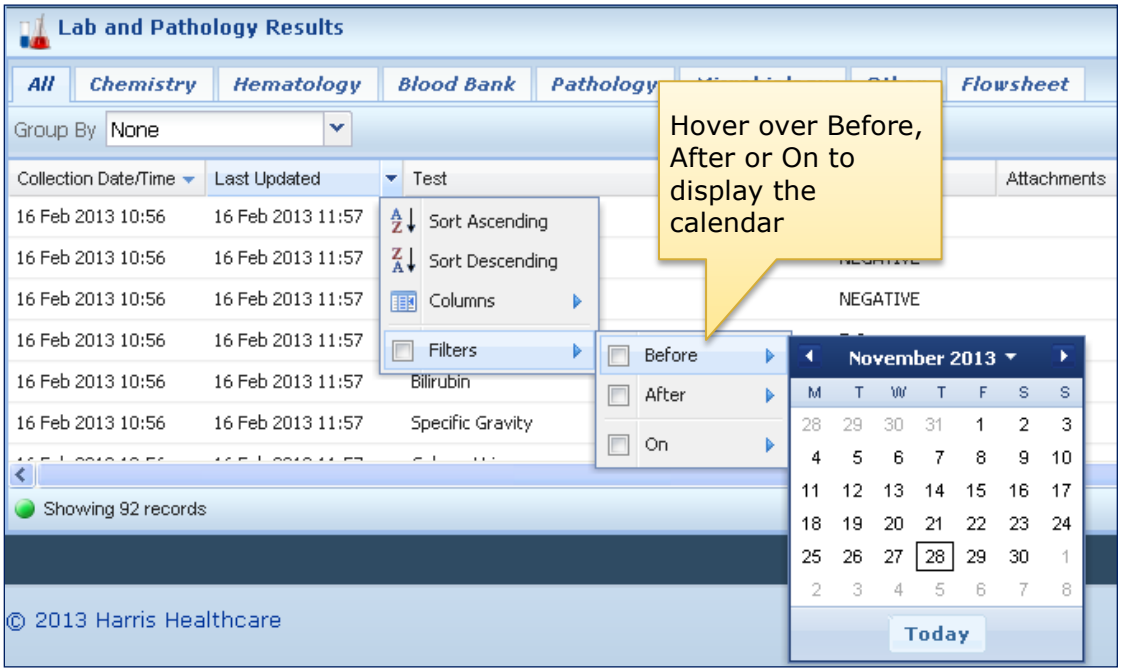


Figure 30: Filters Menu

2. Click a date (e.g., Nov 28 2013) on the calendar or click Today. The portal will automatically check both required boxes to apply the filter (e.g., **Filters** and **Before** are both checked). The portal filters the column data immediately.

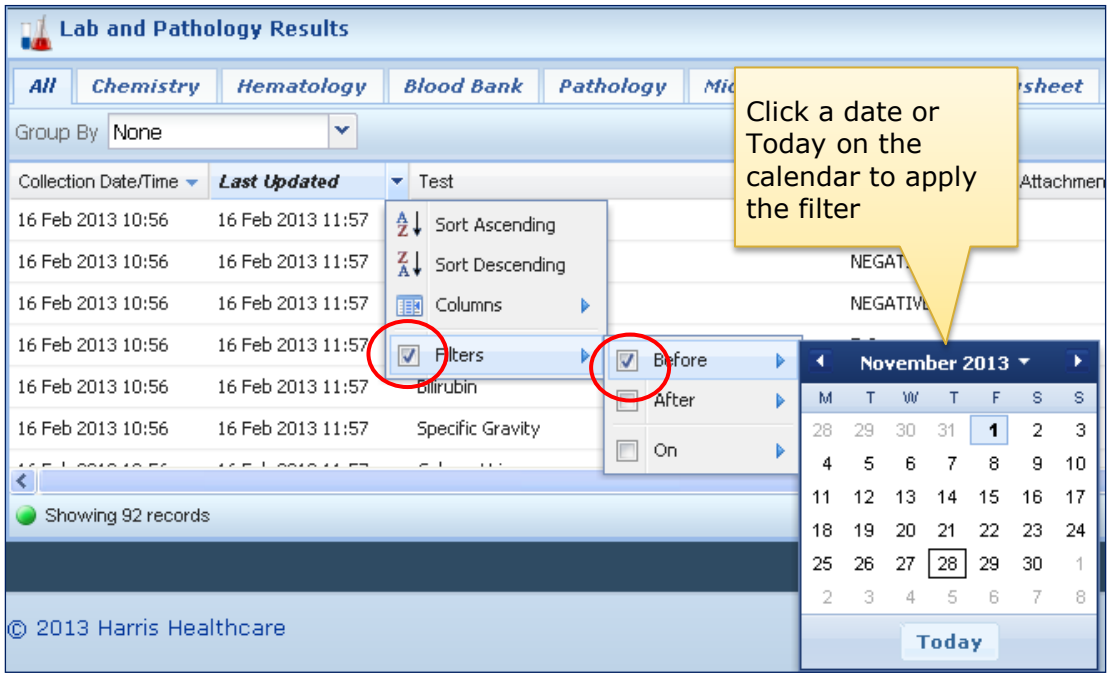


Figure 31: Date Filter Applied

3. To close the menu, click anywhere outside of the menu.

To apply a filter range (e.g., from Dec 16 2013 to March 10 2014):

1. With the filter menu displayed, hover the pointer over After.

2. Specify the desired start date of the range (e.g., Dec 16 2013) by selecting one day prior to it on the calendar (e.g., Dec 15 2013). The portal filters the column data immediately and the menu will close.

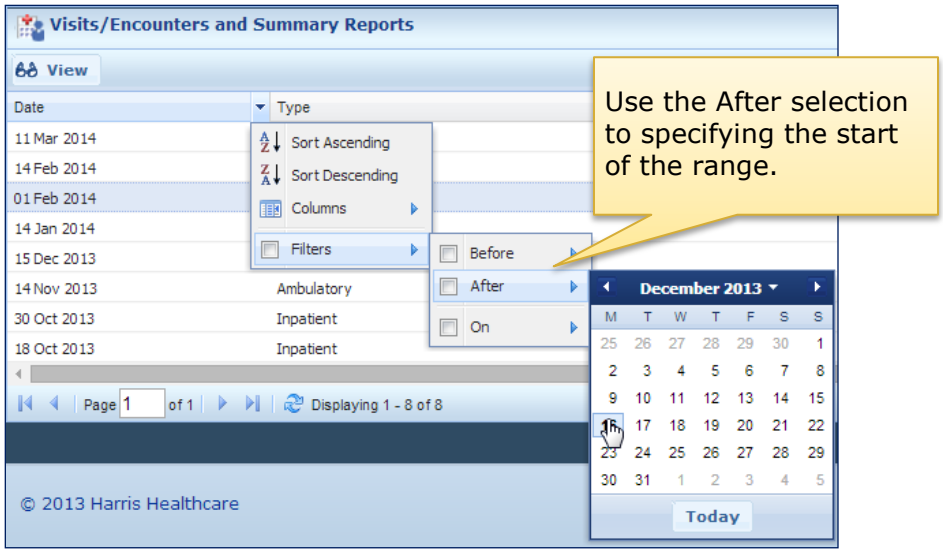


Figure 32: Date Filter, Range Start

3. With the filter menu displayed, hover the pointer over Before.

4. Specify the desired start end of the range (e.g., Mar 10 2014) by selecting one day after it on the calendar (e.g., Mar 11 2014). The portal filters the column data immediately and the menu will close.

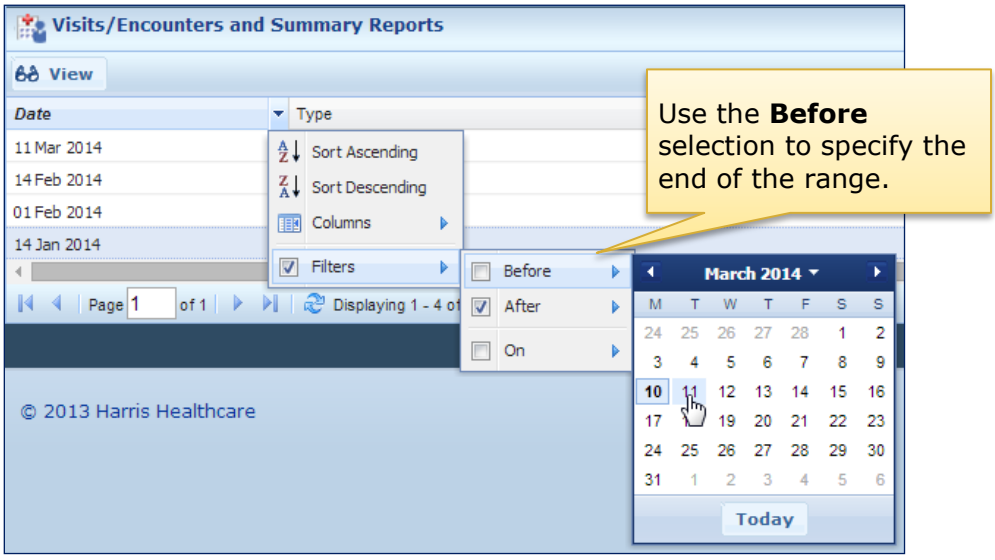


Figure 33: Date Filter, Range End

5. Data is filtered to the specified range.

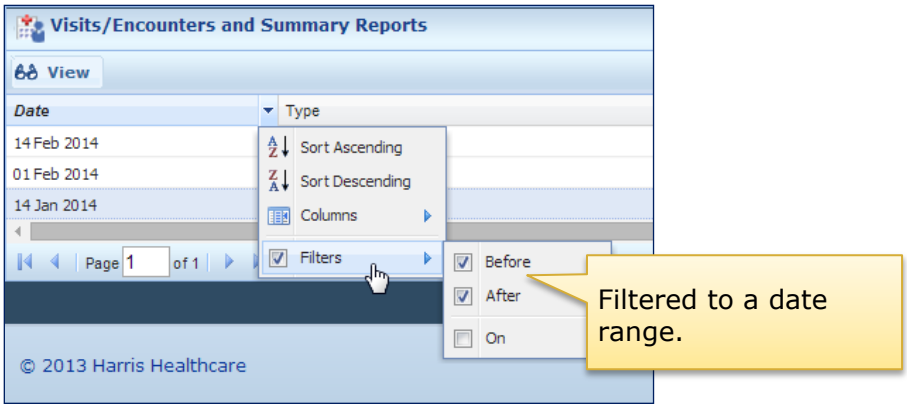


Figure 34: Date Filter, Range Applied

B. Age Filtering

This method is applied on any **Age** column in the portal.

1. Hover the pointer over Filters.
2. Hover the pointer over Older Than, Younger Than or Aged to display the text box.

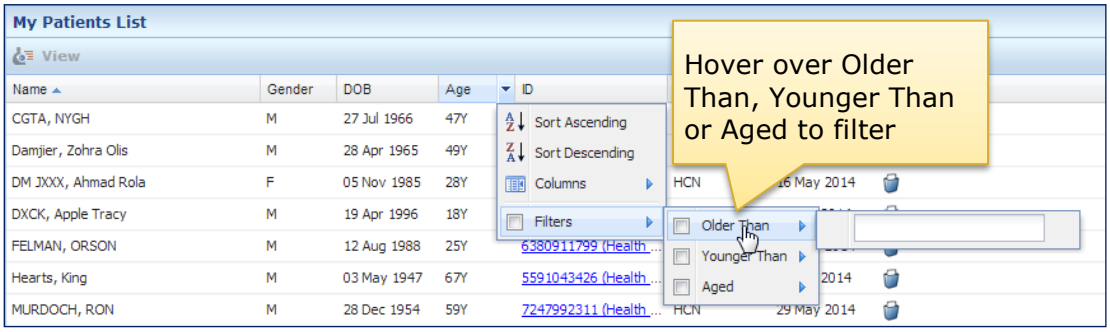


Figure 35: Age Filtering, Menu

3. Enter the filter criteria (age and unit) into the text box. The portal will automatically check both required boxes to apply the filter (e.g., **Older Than** and **Filters** are both checked). The portal filters the column data immediately.

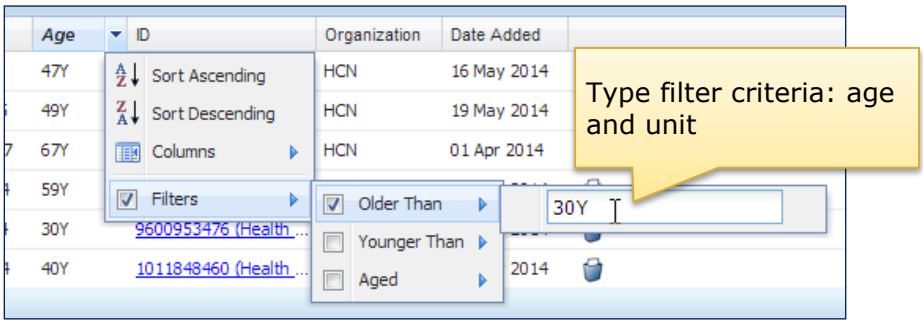


Figure 36: Age Filtering, Text Box

Note: Filter criteria must include the age and the unit. Valid units are listed in the table below. If unit is not included, the menu will close but the filter will not be applied.

Unit	Description
Y	Years
M	Months
W	Weeks
D	Days

Table 2: Age Units

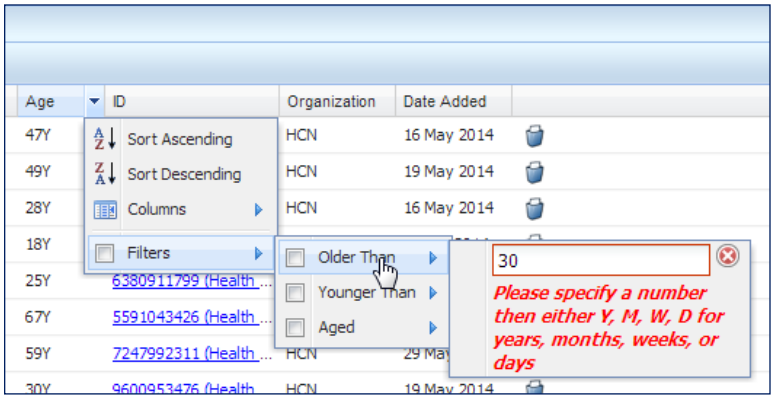


Figure 37: Age Filterig, Error Message

C. Free Text Filtering

This method is employed on the majority of columns in the portal. The user can define the filter criteria by typing text directly into the free text box.

1. Hover the pointer over Filters.
2. Enter text (filter criteria) into the box.

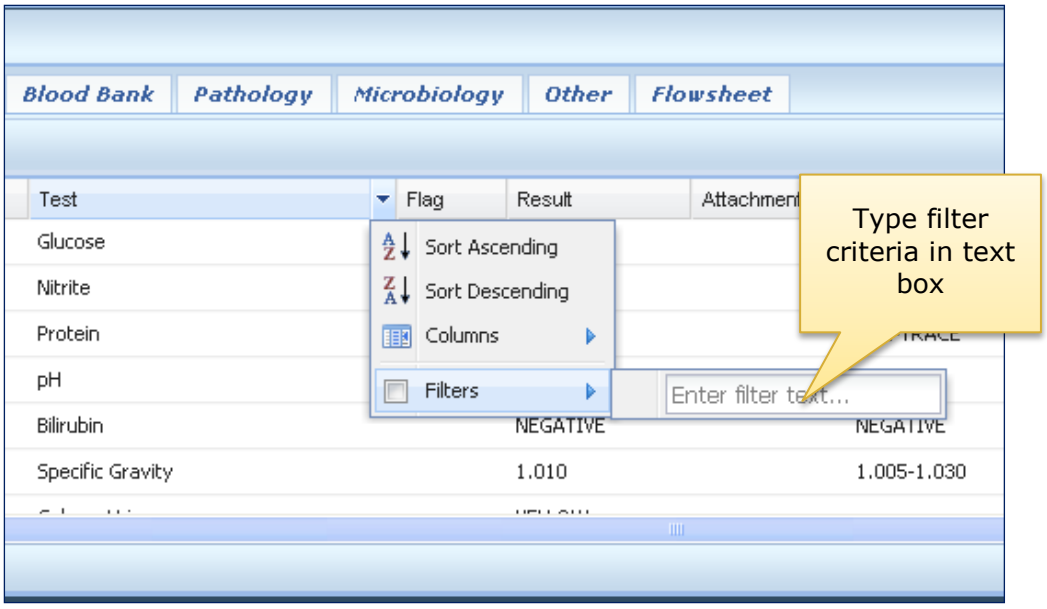


Figure 38: Free Text Filter

3. As soon as a user starts typing, the portal automatically checks the Filters box and the filter is applied to the column data.

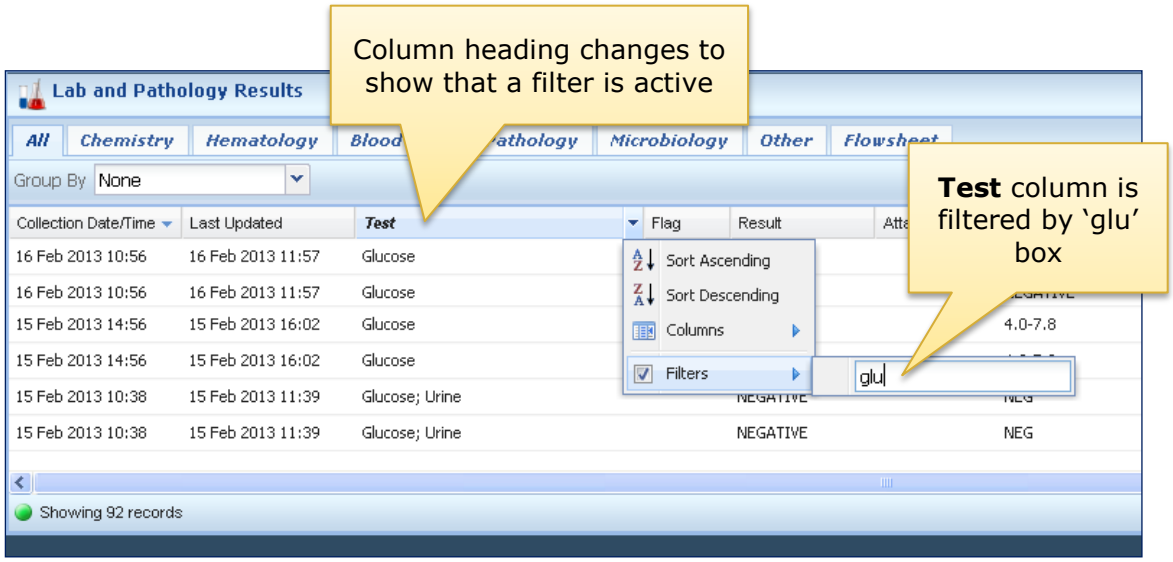


Figure 39: Free Text Filter Applied

4. To close the menu, click anywhere outside of the menu.

D. Selection Filtering

This method is employed on certain columns where the filtering options are restricted. For this release, the only column it applies to is the **Flag** column within the Lab and Pathology Results portlet.

1. Hover over the Filters menu and click the appropriate selection.

2. The filter is immediately applied to the column and the menu closes.

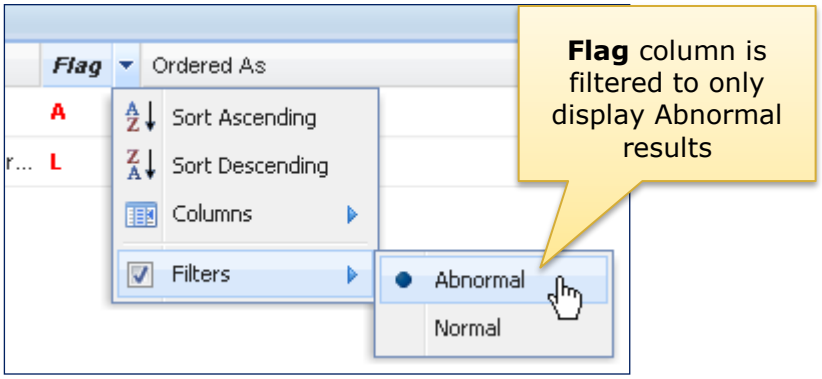


Figure 40: Selection Filtering

Filtering (Remove a Filter)

To remove a filter:

1. Display the Filters list the same way as previously and unselect the check box. The filter criteria will still be displayed, but the filter is not applied if the Filters checkbox is not selected.

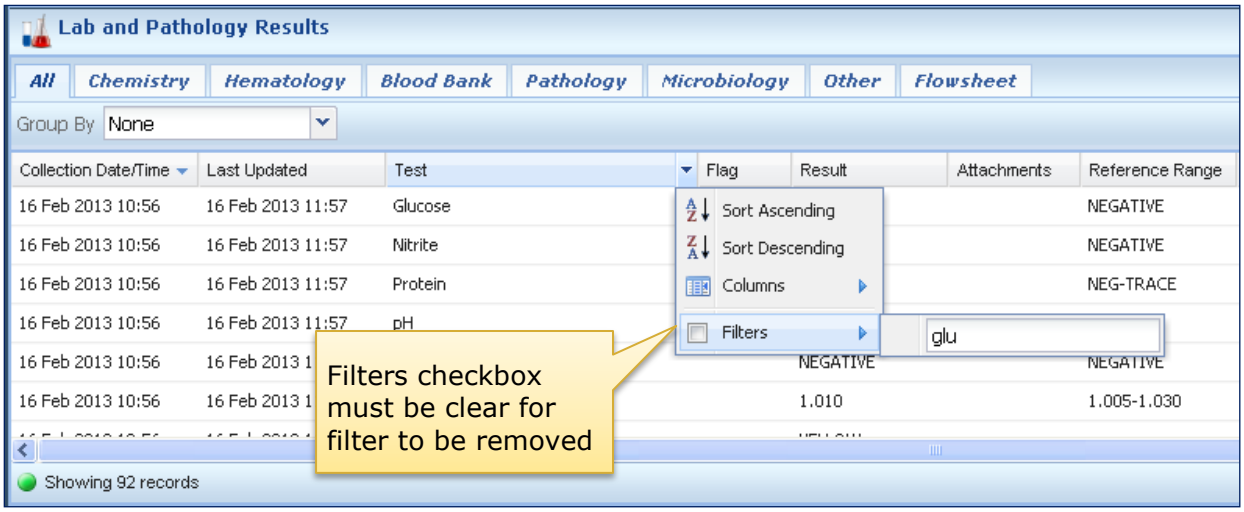


Figure 41: Remove Filter

Note: when de-selecting a date filter, it is the primary Filters checkbox that must be de-selected (not the After, Before, or On checkboxes).

User Preferences (Configure My Grid)

The portal displays patient lists (My Workspace tab) and patient data (Patient Care tab) according to system-wide defaults. Most of these defaults can be modified using the User Preferences icon that is represented on each list/portlet. When changing settings here they will be saved for future logins.

To configure the list (or portlet grid) by applying user preferences:

1. Click the User Preferences icon in the top right corner of the portlet or list title bar.

Figure 42: User Preferences Icon

2. This opens the 'Configure My Grid' dialog box. To apply changes to the portlet, click the Save button Save.

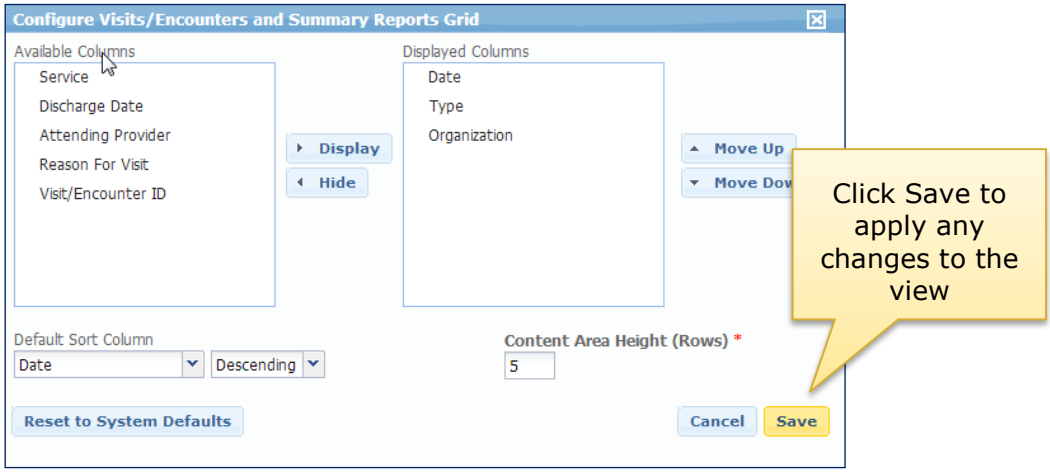


Figure 43: Configure My Grid Dialog, Visits/Encounters Condensed View

User preferences available are:

- Modify columns – hide/display
- Modify columns – change display order
- Change default sort
- Set content area height
- Reset to system defaults

User preferences will be available in all portlets, on both the summary views and the individual portlet views. These preferences are unique to each portlet (including each tab within a portlet), as they are all independent from each other.

Any changes made to any portlet in the Summary View view are unique to that view. For example, changing the configuration of the Documents/Notes portlet in the Summary View view will not affect the configuration of the Documents/Notes portlet in either the Summary List View view or the individual portlet view.

Any changes made to a portlet in the Summary List View view will also be reflected in the same portlet in the individual portlet view. For example, changing the configuration of the Documents/Notes portlet in the Summary List View will make the same change in the Document/Notes individual portlet view.

Modify Columns – Hide/Display

1. Select a column in the **Displayed Columns** list.
2. Click Hide.

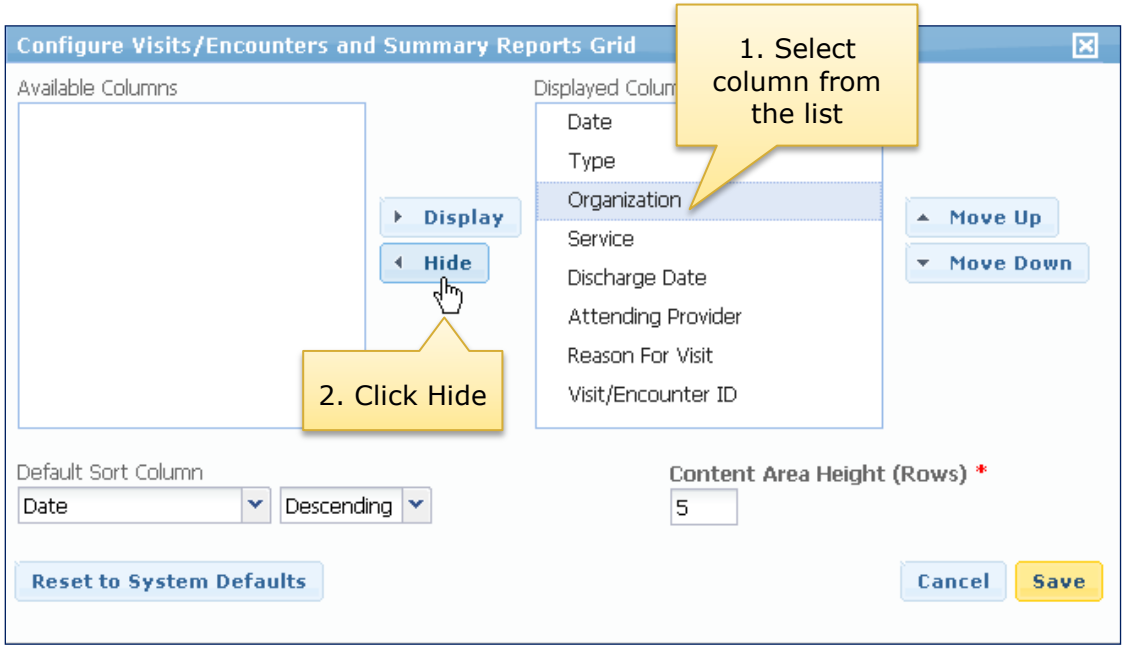


Figure 44: Hide Column

This will move the column to the **Available Columns** list and hide it from display. The reverse action can also be taken to display a hidden column in the list.

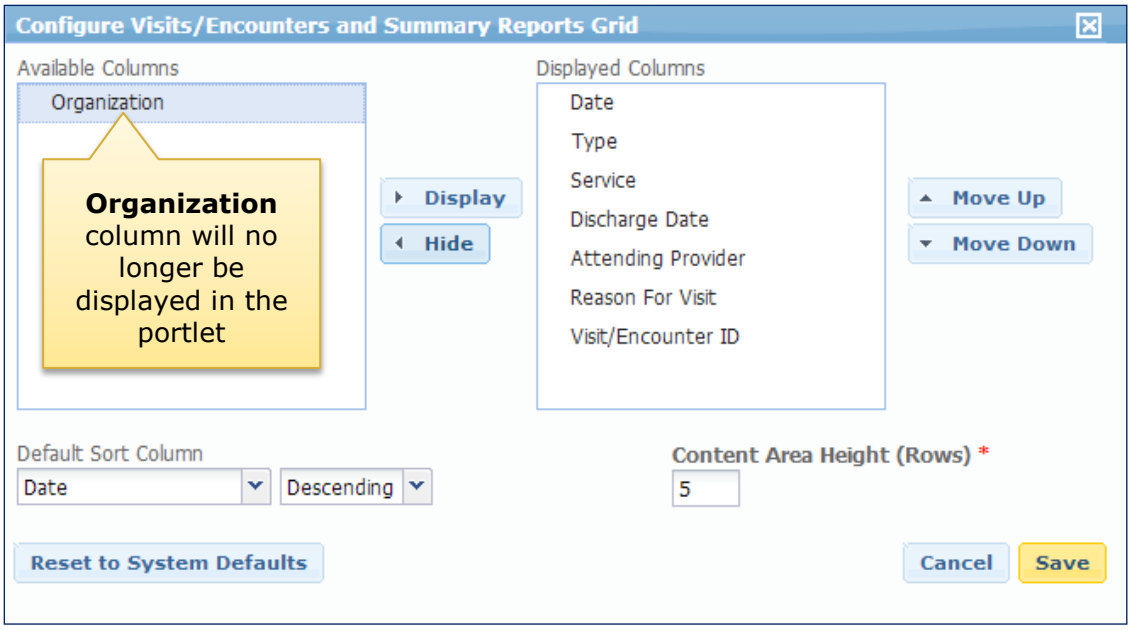


Figure 45: Hide Column, Successful

Note: Columns with a lock icon beside them cannot be removed from the list.

Modify Columns – Change Display Order

1. Select a column in the **Displayed Columns** list.
2. Click Move Up or Move Down to adjust the position of the column.

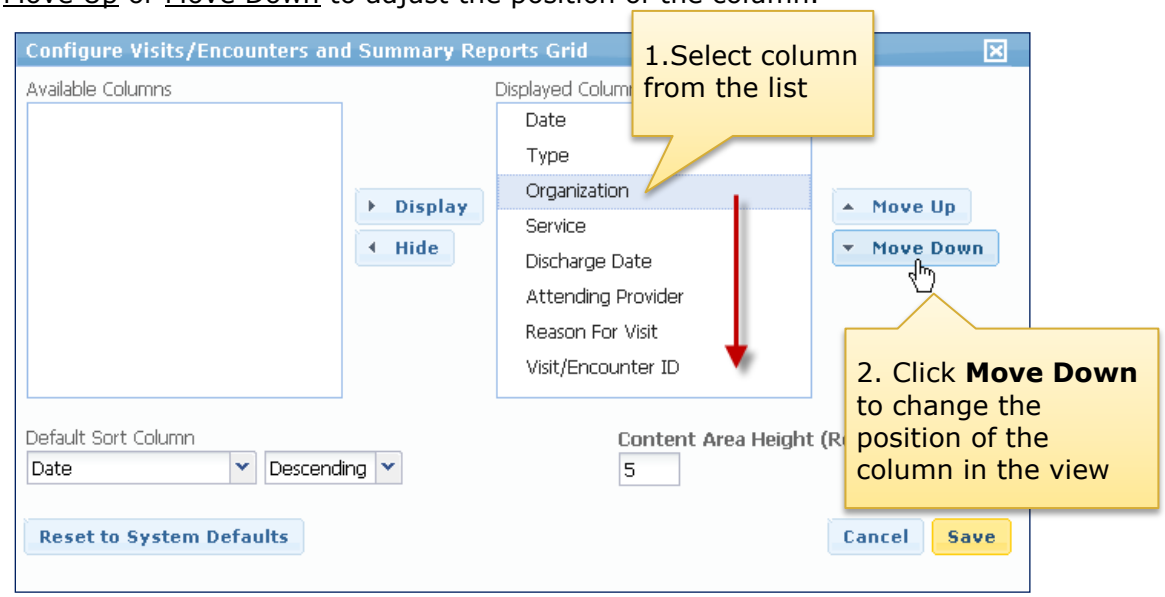


Figure 46: Move Columns

This will move the position of the column in the displayed list.

Change Default Sort

1. Select a column from the **Default Sort Column** drop down list to change the column which is used as the default sort.
2. Specify if the default sort is ascending or descending.

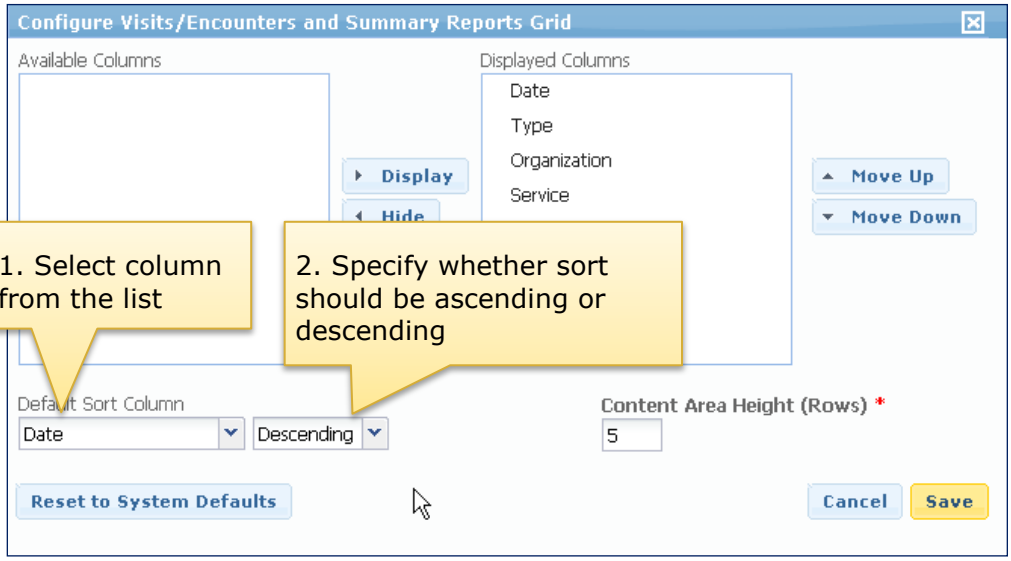


Figure 47: Specify Default Sort

Set Content Area Height

1. In the **Content Area Height (Rows)** box, specify the number of rows to display per page in the list.

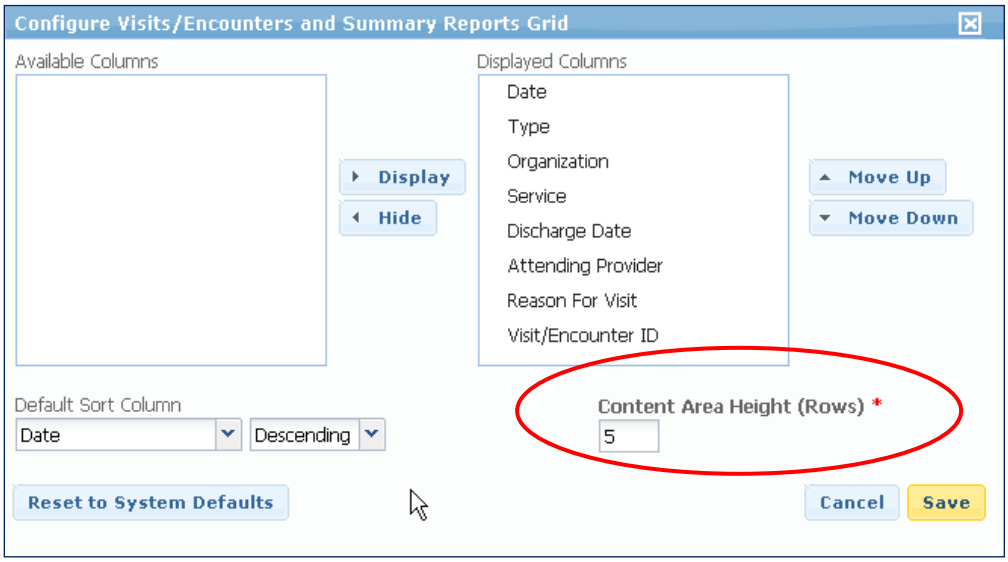


Figure 48: Set Rows

Once applied, paging will be employed to see all results that don't fit on the first page. For the list of default number of rows by portlet, see Paging.

Reset to System Defaults

1. Click Reset to System Defaults button.

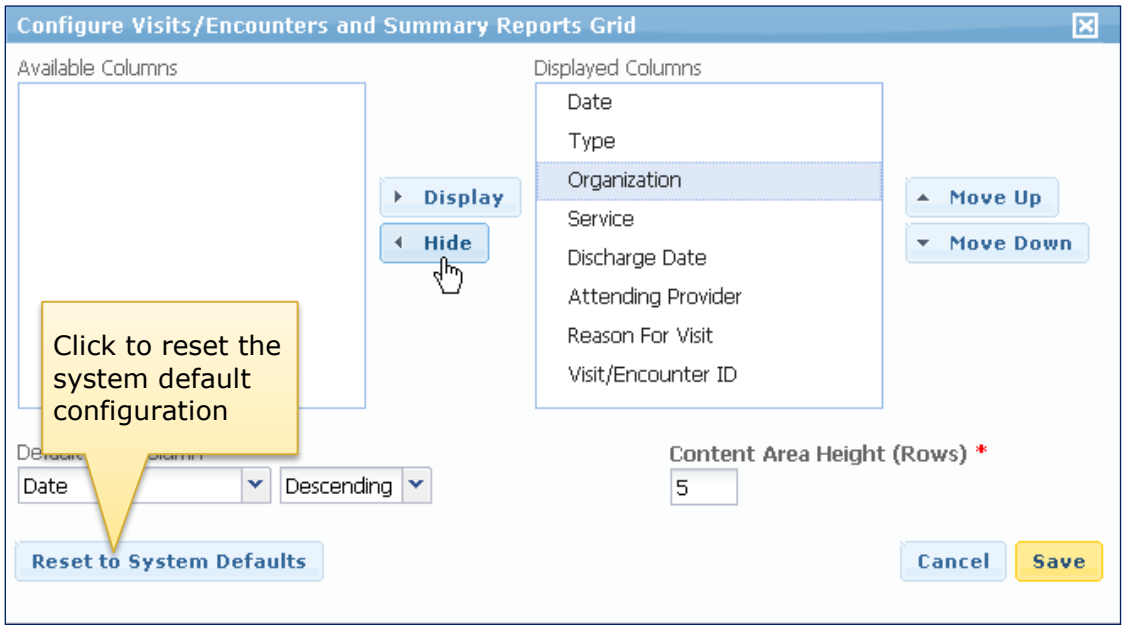


Figure 49: Reset to System Defaults Button

2. When prompted, select Confirm Reset to return to the list view with all defaults in place.

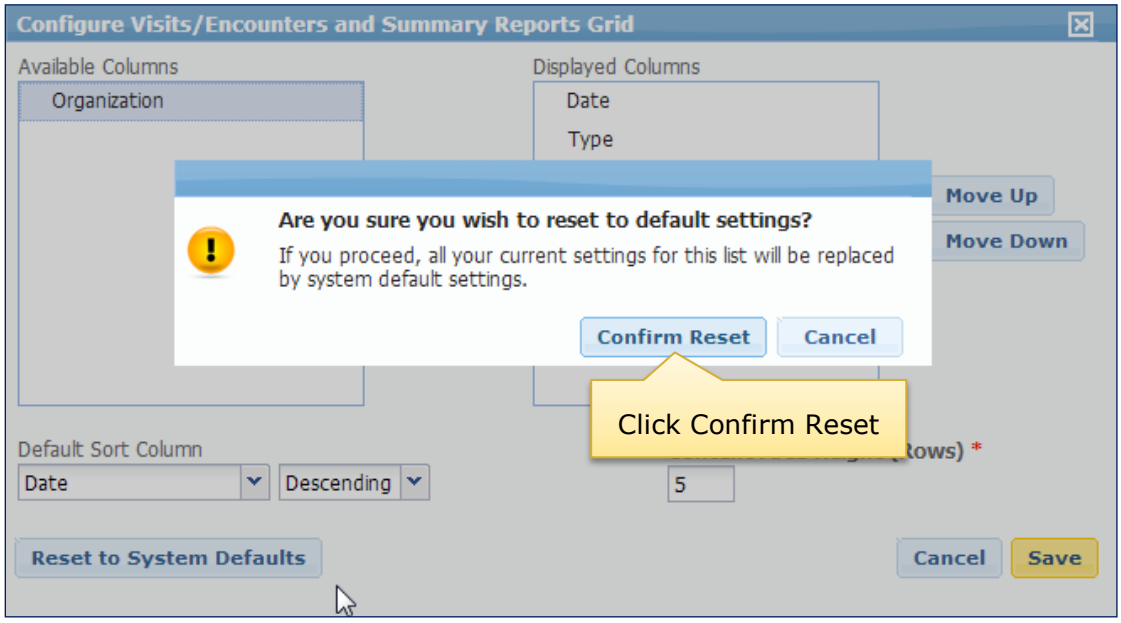


Figure 50: Confirm Reset Dialog

Loading Data

Note: this applies to CDR portlets only. Behaviour for Lab and Pathology Results is described Lab and Pathology Results: Data Availability Indicators.

The user will know that data is loading, by:

1. 'Loading…' bar that appears at the bottom of the portlet
2. 'Processing' icon that replaces the 'refresh' icon.

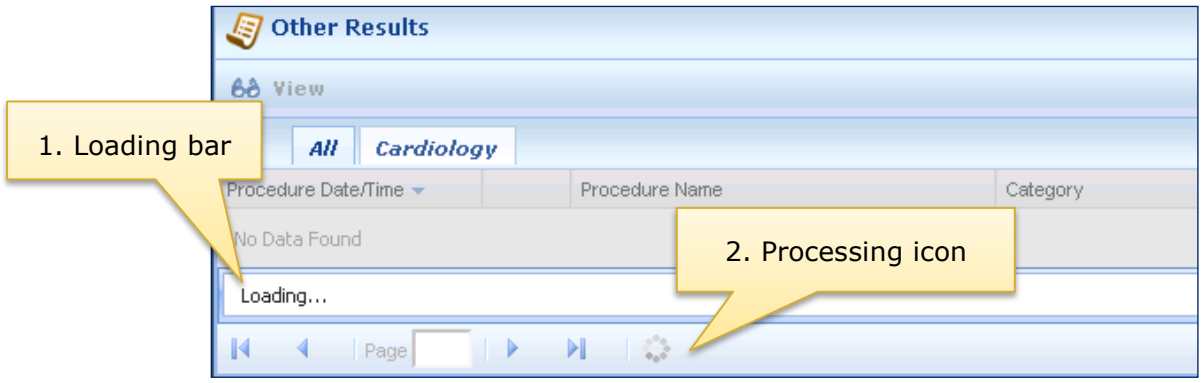


Figure 51: Loading Data

When the query has been successfully executed but there is no data to display, a 'No Data Found' message will display directly in the portlet.

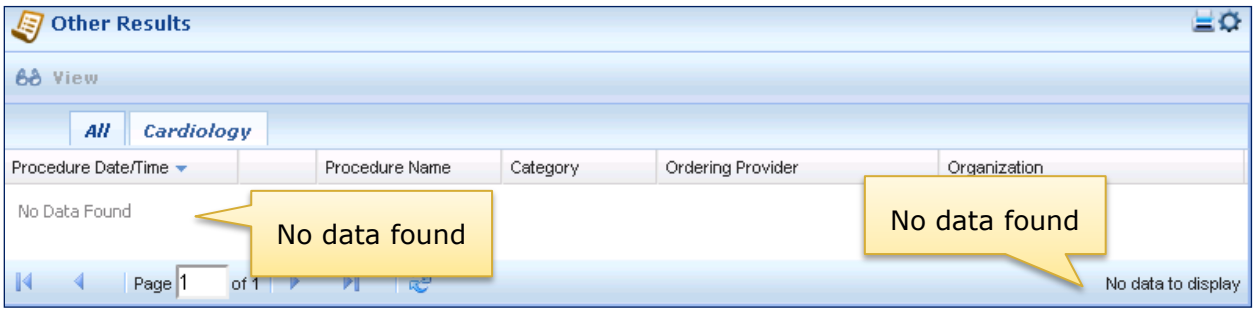


Figure 52: No Data Found

If errors are encountered while loading data, a yellow banner will appear at the top of the portlet to indicate this to the user (*"One or more data sources reported a problem retrieving data. Not all results may be shown."*).

Patient Banner

The patient banner identifies the current patient and appears at the top of every page containing patient-specific information (i.e., not available on My Workspace). The patient banner displays both patient demographic information and contact information. The patient banner will display in either a concise collapsed view or more detailed expanded view.

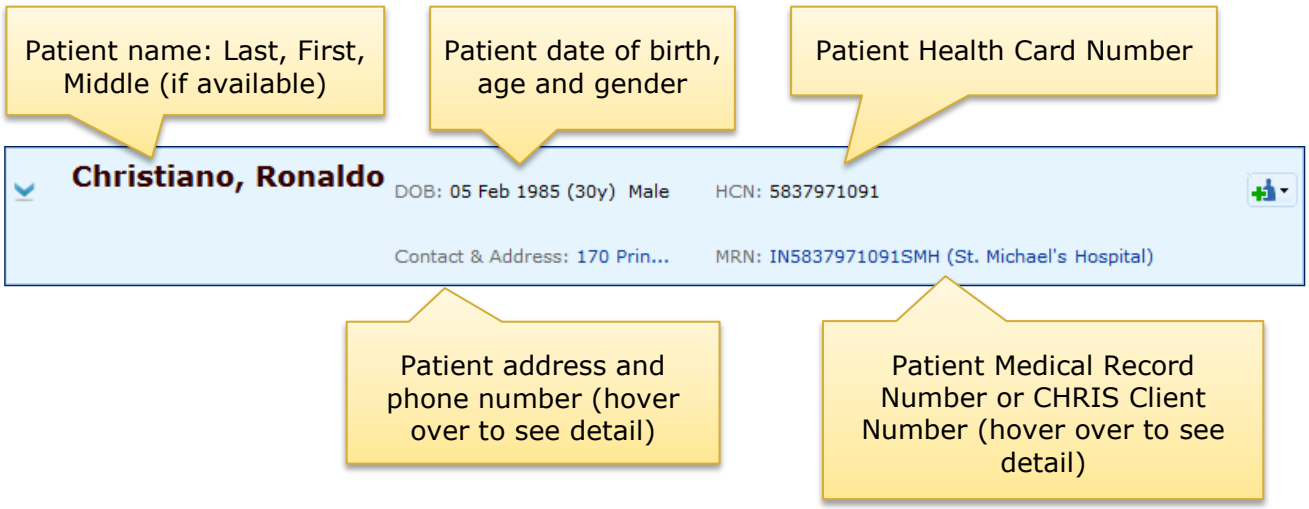

Patient name: Last, First, Middle (if available)
Patient date of birth, age and gender
Patient Health Card Number
Christiano, Ronaldo
DOB: 05 Feb 1985 (30y) Male
HCN: 5837971091
Contact & Address: 170 Prin...
MRN: IN5837971091SMH (St. Michael's Hospital)
Patient address and phone number (hover over to see detail)
Patient Medical Record Number or CHRIS Client Number (hover over to see detail)

Figure 53: Patient Banner, Overview

On the patient banner, the following actions can be performed:

1. Expand or collapse the patient banner, by clicking the chevron icon . By default, the patient banner will be expanded.

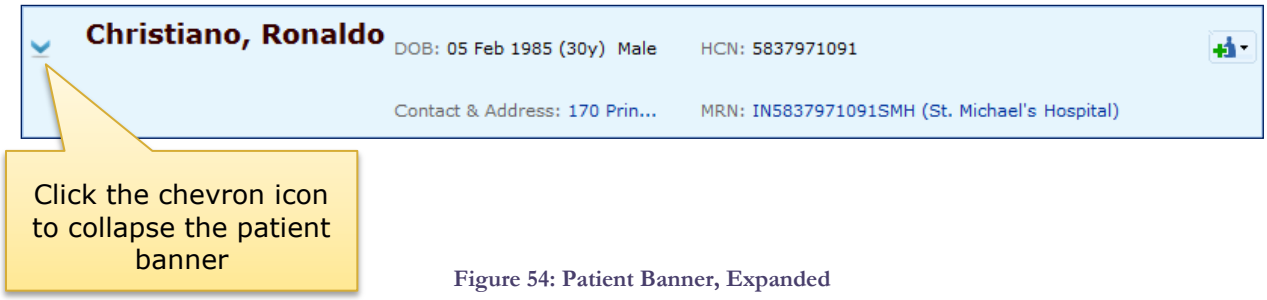

Christiano, Ronaldo
DOB: 05 Feb 1985 (30y) Male
HCN: 5837971091
Contact & Address: 170 Prin...
MRN: IN5837971091SMH (St. Michael's Hospital)
Click the chevron icon to collapse the patient banner

Figure 54: Patient Banner, Expanded

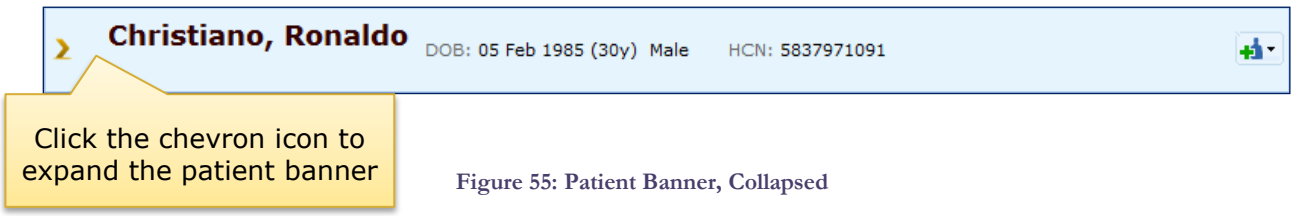


Figure 55: Patient Banner, Collapsed

2. Add/remove the patient to/from My Patients List, see Add or Remove Patient.
3. View truncated data appearing in a hover over. When there is more information for a field, the field appears as a link (blue text) and/or contains an … (ellipsis). Hover the pointer over the field to show all the data in a tool tip.

Hover the pointer over the Contact & Address field to see the full set of information

Note: The display of patient contact information is dependent on the organization the user is logged into the portal with.

1. If the patient's contact information was captured by the same organization that the user is logged in under, the patient's contact information will be displayed in the patient banner.
2. If the patient's contact information was captured by a different organization than the one the user is logged in under, the patient's contact information will appear blank in the patient banner

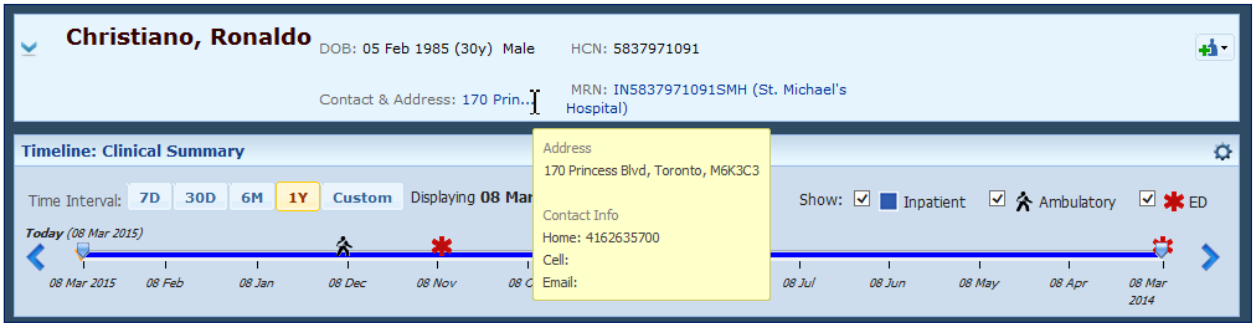


Figure 56: Contact and Address Information

Hover the pointer over the MRN field to see full set of patient IDs. Note that the ID displayed directly on the patient banner should be the ID associated with the Organization the user is currently working under the authority of. If the patient does not have an MRN for the organization the user is working under, the most recent MRN will be displayed.

Christiano, Ronaldo
DOB: 05 Feb 1985 (30y) Male
HCN: 5837971091
Contact & Address: 170 Prin...
MRN: IN5837971091SMH (St. Michael's Hospital)
MRN
ID Type
Organization
Name
DOB
Gender
IN5837971091SMH MRN St. Michael's Hospital Christiano, Ronaldo 05 Feb 1985 (30y) M
IN5837971091MHC Chris ID# Mississauga Halton CCAC Christiano, Ronaldo 05 Feb 1985 (30y) M
IN5837971091W MRN William Osler Health System Christiano, Ronaldo 05 Feb 1985 (30y) M
IN5837971091MHC Chris ID# Central East CCAC Christiano, Ronaldo 05 Feb 1985 (30y) M
IN5837971091MHC Chris ID# Central West CCAC Christiano, Ronaldo 05 Feb 1985 (30y) M
IN5837971091MHC Chris ID# Central CCAC Christiano, Ronaldo 05 Feb 1985 (30y) M
IN5837971091MHC Chris ID# Toronto Central CCAC Christiano, Ronaldo 05 Feb 1985 (30y) M
ED
08 Mar 2014

Figure 57: MRN Information

Add or Remove Patient

To add the current patient to a patient list, or remove the current patient from a patient list, use the add or remove current patient feature.

1. Click the Add/Remove Patient button to open a tooltip containing available patient lists

- Lists that are checked indicate the current patient is on that list
- Lists that are not checked indicate the current patient is not on that list

2. Check or clear the box
    - To add a patient to a list, check the list's check box
    - To remove a patient from a list, clear the list's check box
3. Click Done.

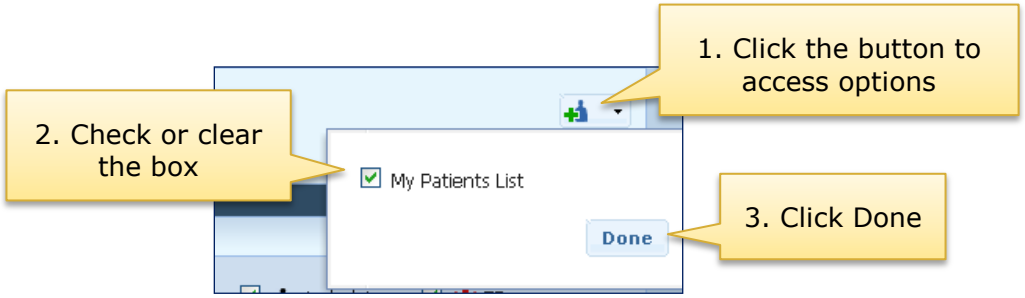


Figure 58: Add/Remove Patient Button

The portal adds or removes the patient, closes the patient list tooltip and displays a confirmation message.

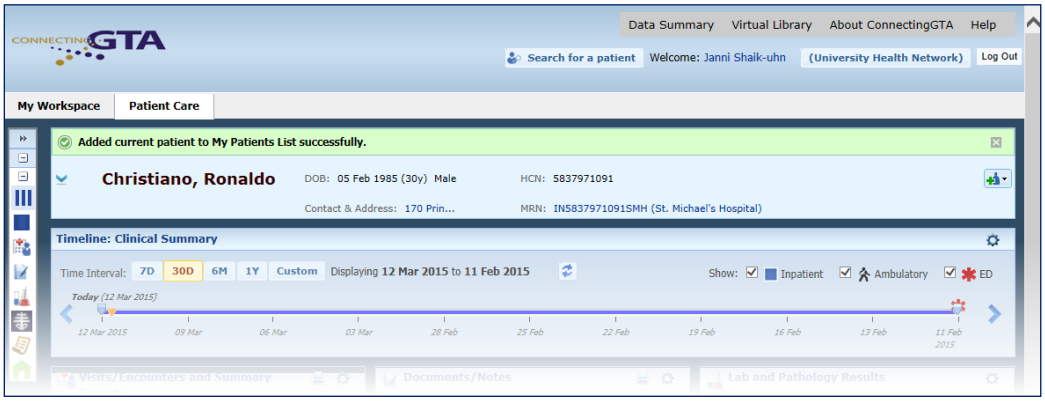


Figure 59: Patient Added Confirmation Message

Calendar

Where entry of a date is required in the portal, two methods are available: type the date directly into a date field or use the calendar widget (if available for the field).

Figure 60: Calendar Button

A. Select a date within the current month:

1. Click on the appropriate date directly on the displayed calendar or select the Today button. The calendar closes automatically and puts the selected date in the date field.

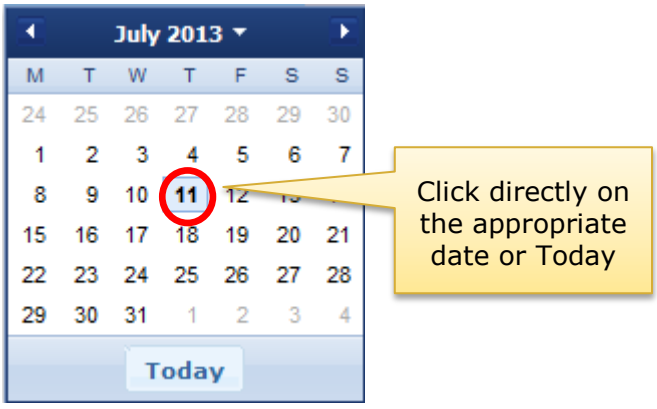


Figure 61: Calendar – Select Date

B. Select a date in a different month:
   1. Click the previous or next arrow to step through the calendar one month at a time.
   2. Click on the appropriate date. The calendar closes automatically and puts the selected date in the date field.

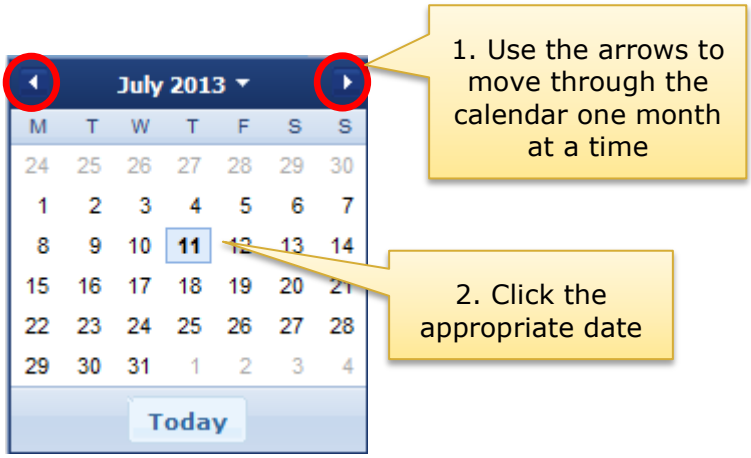

July 2013
M T W T F S S
24 25 26 27 28 29 30
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31 1 2 3 4
Today
1. Use the arrows to move through the calendar one month at a time
2. Click the appropriate date

Figure 62: Calendar – Change Month

C. Select a date in a different month and/or year:
   1. Click the drop-down to open the month/year selector

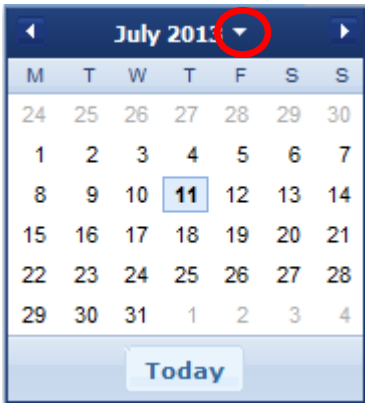


Figure 63: Calendar – Select Drop Down

2. Use the previous or next arrow to show other years, if needed.
3. Click the month and year.
4. Click OK.

Figure 64: Calendar – Select Month/Year

The user will then be prompted to select the date within that month/year on the calendar popup.

Viewing Documents

The document viewer is a separate window that opens when you select a document for viewing from any portlet. Because each portlet contains different types of data, the document viewer will be slightly different for each component. The document viewer can be accessed three ways:

1. Click the attachment icon
2. Double-click the row
3. Select the row of interest and select View

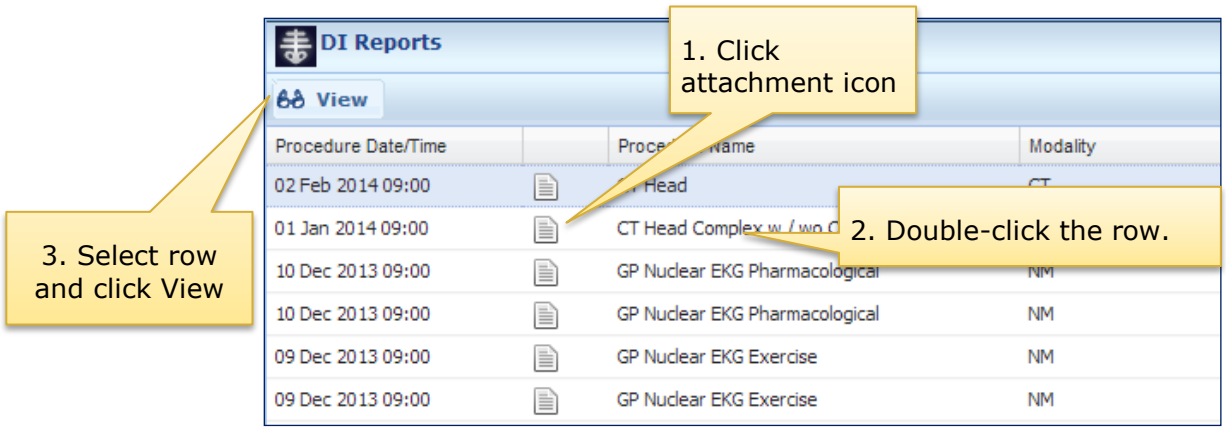


Figure 65: Opening the Document Viewer

The document viewer window will open to display the attachments. If there are multiple attachments, each will display on its own tab. The following information will be displayed:

- Patient Name, Health Card Number (HCN), Date of Birth (DOB) and Gender
- Summary information (varies based on which portlet the attachment is opened from)
- Attachment content
- Privacy Disclaimer
- Footer information (User ID, Organization, Date/Time)

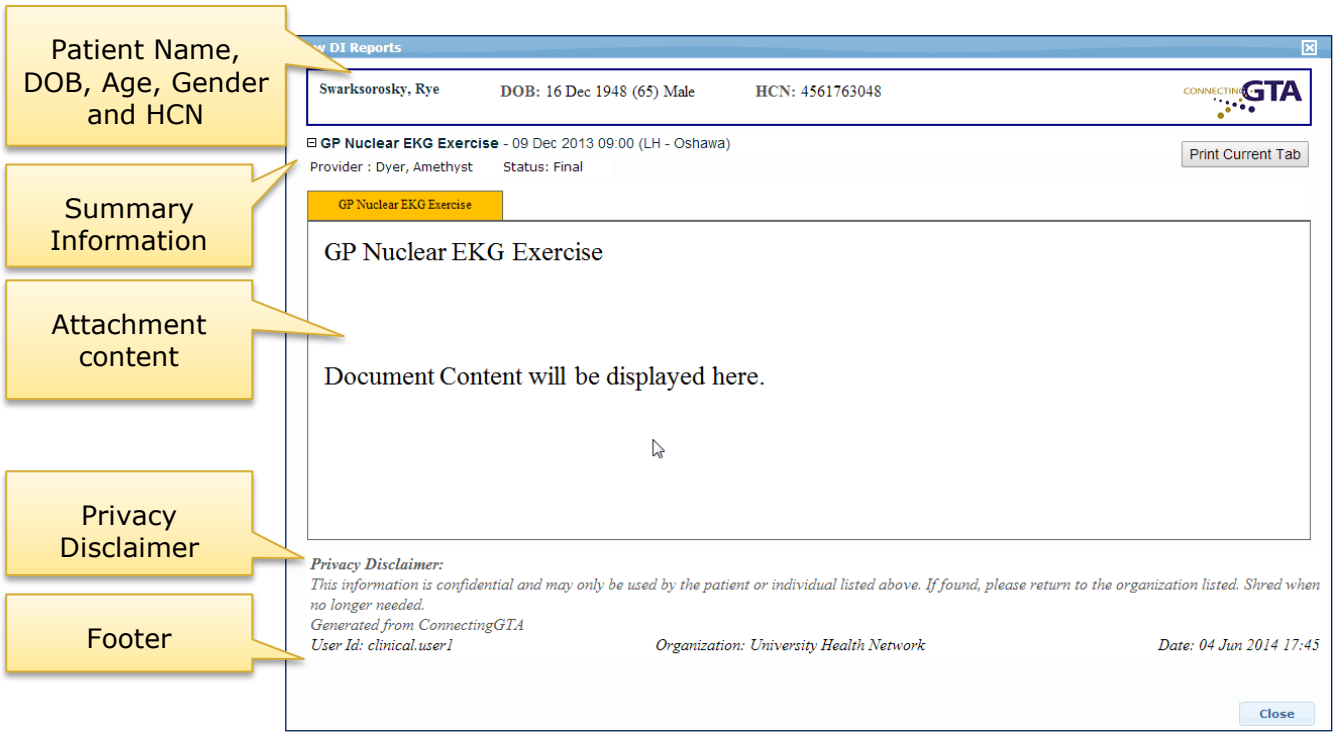

Patient Name, DOB, Age, Gender and HCN
Summary Information
Attachment content
Privacy Disclaimer
Footer
DI Reports
Swarksorosky, Rye
DOB: 16 Dec 1948 (65) Male
HCN: 4561763048
GP Nuclear EKG Exercise - 09 Dec 2013 09:00 (LH - Oshawa)
Provider : Dyer, Amethyst
Status: Final
Print Current Tab
GP Nuclear EKG Exercise
GP Nuclear EKG Exercise
Document Content will be displayed here.
Privacy Disclaimer:
This information is confidential and may only be used by the patient or individual listed above. If found, please return to the organization listed. Shred when no longer needed.
Generated from ConnectingGTA
User Id: clinical.user1
Organization: University Health Network
Date: 04 Jun 2014 17:45
Close

Figure 66: Document Viewer Framework

Users can print attachments from the document viewer, one tab at a time. See Printing from Document Viewer.

Users must close the document viewer to continue working in the portal.

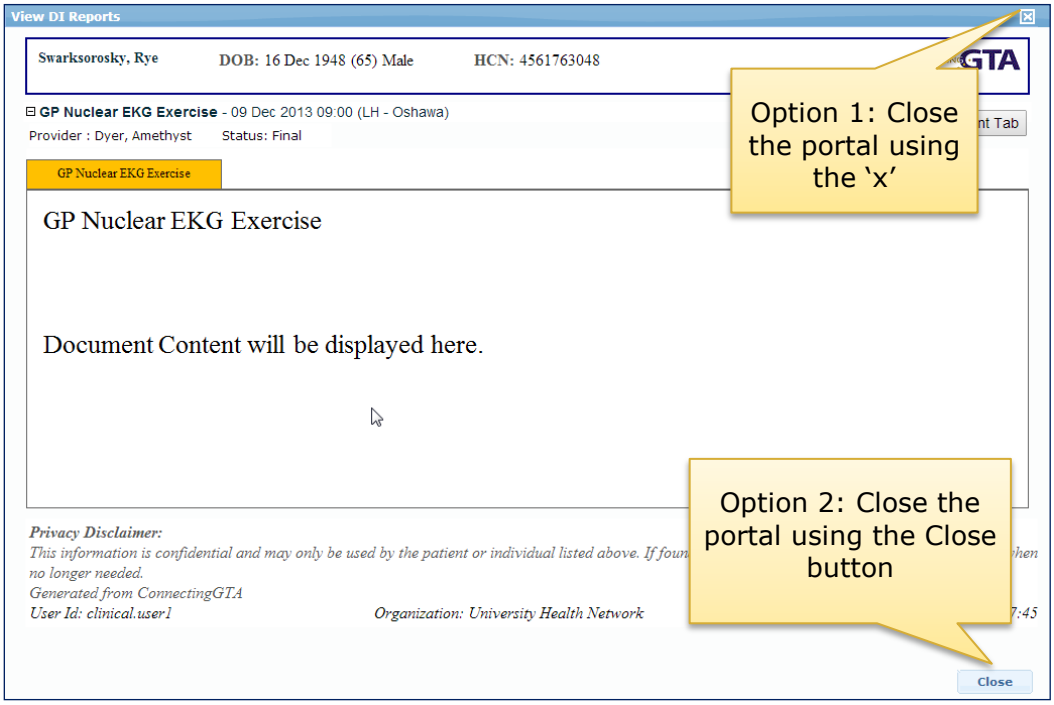

View DI Reports
Swarksorosky, Rye
DOB: 16 Dec 1948 (65) Male
HCN: 4561763048
GP Nuclear EKG Exercise - 09 Dec 2013 09:00 (LH - Oshawa)
Provider : Dyer, Amethyst
Status: Final
GP Nuclear EKG Exercise
GP Nuclear EKG Exercise
Document Content will be displayed here.
Privacy Disclaimer:
Generated from ConnectingGTA
User Id: clinical.user1
Organization: University Health Network
Option 1: Close the portal using the 'x'
Option 2: Close the portal using the Close button
Close

Figure 67: Closing the Document Viewer

The Visits and Encounters and Community portlets allow for multiple documents to be associated with a single visit. If the number of documents associated to a single visit or referral exceeds the maximum that can be displayed (20), a message will be displayed in each applicable portlet.

Documents displayed in the Visits and Encounters portlet are also displayed in the Documents and Notes portlet. If the number of documents for a visit exceeds 20, the following message will be displayed

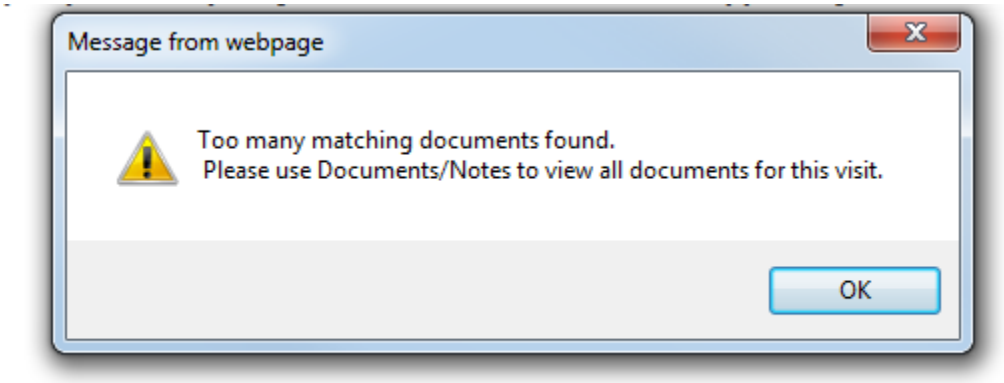
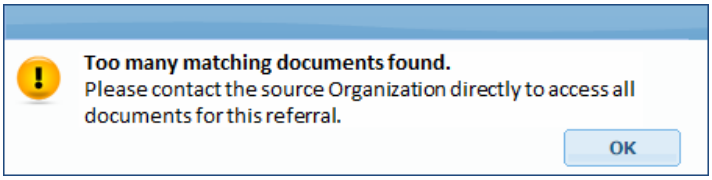

Message from webpage
Too many matching documents found.
Please use Documents/Notes to view all documents for this visit.
OK

Figure 68: Too many matching documents – Visits and Encounters

Documents in the Community portlet only appear in the community portlet. If the number of documents for a community encounter exceeds 20, the following message will be displayed


Too many matching documents found.
Please contact the source Organization directly to access all documents for this referral.
OK

Document Size

The largest file that can be sent to the portal is 7MB. Files larger than 7MB will be divided to smaller files by sites before sending to ConnectingGTA. Sites are suggested to name the files part 1 and part 2 to indicate the relationship of the files, however this may not always be the case.

Document Types

The following report types can be sent to portal to display: DOC, GIF, HTML, JPG, PDF, RTF, TIFF, XML.

DOC and RTF files have to be downloaded by local applications to be viewed. Depending on the plugins available on the user's workstation, TIFF and PDF document may also have to be downloaded by local applications to be viewed. Users must ensure that if PHI or personal information is downloaded onto a mobile device from the portal, the location where the data is stored is encrypted or the device utilizes full disk encryption.

1. Users will be presented with two tabs – the first tab provides instructions for viewing the document:

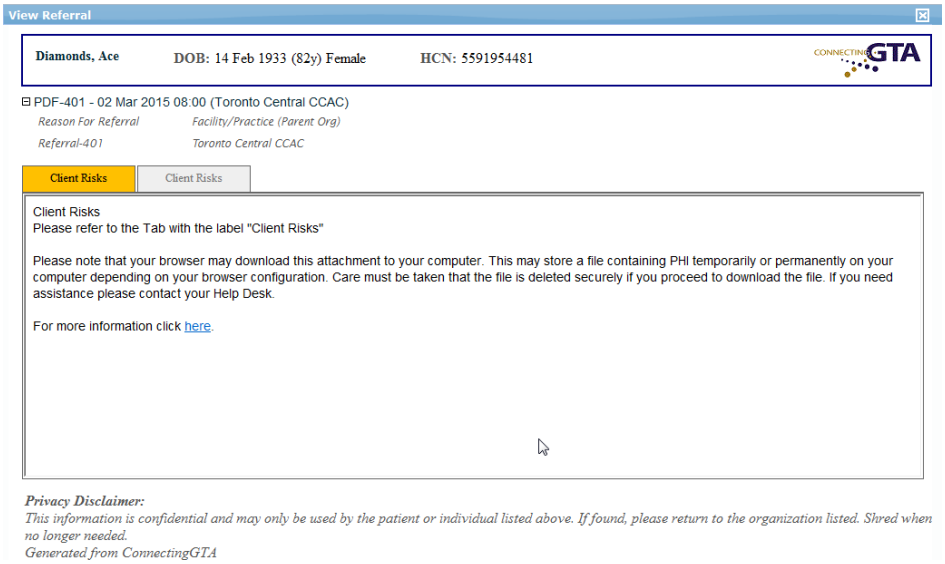

View Referral
Diamonds, Ace
DOB: 14 Feb 1933 (82y) Female
HCN: 5591954481
PDF-401 - 02 Mar 2015 08:00 (Toronto Central CCAC)
Reason For Referral
Facility/Practice (Parent Org)
Referral-401
Toronto Central CCAC
Client Risks
Client Risks
Client Risks
Please refer to the Tab with the label "Client Risks"
Please note that your browser may download this attachment to your computer. This may store a file containing PHI temporarily or permanently on your computer depending on your browser configuration. Care must be taken that the file is deleted securely if you proceed to download the file. If you need assistance please contact your Help Desk.
For more information click here.
Privacy Disclaimer:
This information is confidential and may only be used by the patient or individual listed above. If found, please return to the organization listed. Shred when no longer needed.
Generated from ConnectingGTA

Figure 69: Document View with Multiple Tabs

2. Follow the instructions displayed within the Document Viewer to trigger the download of the document. In the example below, click on the second tab to trigger the File Download dialog.
3. Select Open.
4. Download will download using standard browser functionality.

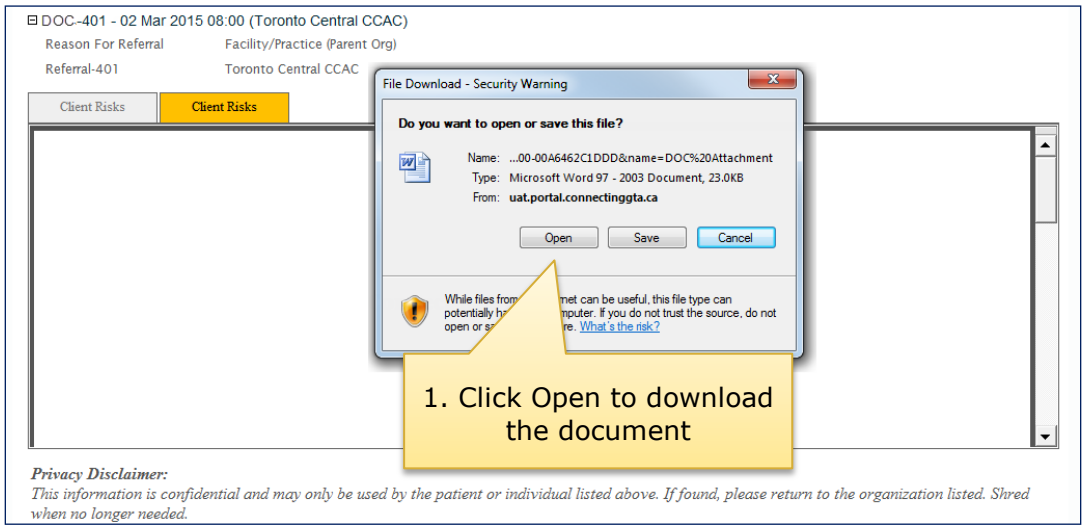

DOC-401 - 02 Mar 2015 08:00 (Toronto Central CCAC)
Reason For Referral
Facility/Practice (Parent Org)
Referral-401
Toronto Central CCAC
Client Risks
Client Risks
File Download - Security Warning
Do you want to open or save this file?
Name: ...00-00A6462C1DDD&name=DOC%20Attachment
Type: Microsoft Word 97 - 2003 Document, 23.0KB
From: uat.portal.connectinggta.ca
Open
Save
Cancel
1. Click Open to download the document
Privacy Disclaimer:
This information is confidential and may only be used by the patient or individual listed above. If found, please return to the organization listed. Shred when no longer needed.

Figure 70: File Download Dialog

Other files types can be viewed directly in the Document Viewer, as long as the add-ons are configured.

Note: When using chrome, these documents will automatically download locally (and appear in the downloads bar at the bottom of the browser). The first tab in document viewer will indicate that clicking on the second tab will download the file locally. Users must ensure that if PHI or personal

information is downloaded onto a mobile device from the portal, the location where the data is stored is encrypted or the device utilizes full disk encryption. Delete the file when you log out of the Solution.

Printing

Note that the user may only print personal health information from the portal if it is allowed by the user's organizational policies. Additionally, the user must handle any print-outs according to their organizational procedures.

The following table provides a summary of what can be printed in the portal from My Workspace tab.

List	
My Patients List	✔
My Recent Patients List	✔

Table 3: Printing from My Workspace Tab

The following table provides a summary of what can be printed in the portal from Patient Care tab.

	Available Views			
Portlet	**Summary (3 Col)**	**Summary (1 Col)**	**Individual Portlet**	**Document Viewer**
Visits/Encounters and Summary Reports	✔	✔	✔	✔
Documents/Notes	✔	✔	✔	✔
DI Reports	✔	✔	✔	✔
Other Results	✔	✔	✔	✔
Lab and Pathology Results	✖	✖	✖	✔
Community	✔	✔	✔	✔

Table 4: Printing from Patient Care Tab

Printing functionality is disabled in the summary views (1 or 3 column views) of the Lab and Pathology Results portal. The summary views do not include adequate detail and may impact a clinical decision. Therefore, printing has been disabled to prevent an end-user from printing and

saving incomplete information. End-users should not use their keyboards' "Print Scrn" function to take a snapshot of any view because it may include incomplete information.

Printing from List Views

Printing from a list view includes the following:

- Printing My Patients List and My Recent Patients List
- Printing any portlet from Summary View view
- Printing any portlet from Summary List View view
- Printing any portlet from the individual portlet view

For Internet Explorer 8 users: To ensure that your printed copy includes attachment icons, ensure that the print option **Print Background Colors and Images** is selected. To select or review this option, from the **File** menu, click **Page Setup...**.

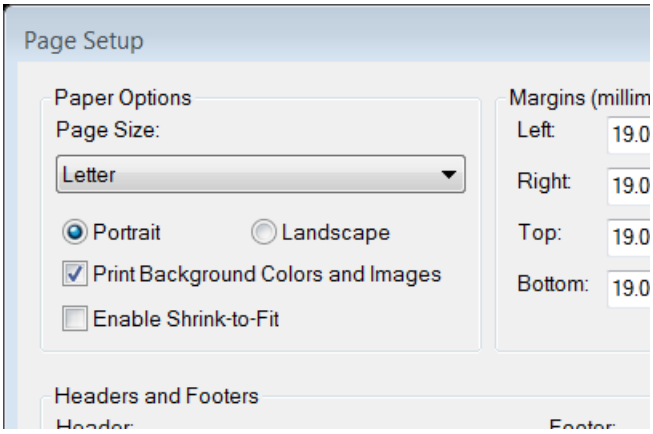


Figure 71: Page Setup Dialog

To print a list:

1. Click the Print icon in the upper right corner of the list/portlet. *Note that this printing functionality will not be available from the Lab and Pathology Results portlet.*

Figure 72: Print Icon

2. When the print icon is clicked, the standard print dialog for the internet browser will open. This dialog will vary depending on which internet browser is in use.

The ConnectingGTA Header and Footer will be applied to all list views when printed. Note that Patient's Name, HCN, DOB, and Gender will not be printed if the printing is originating from My Workspace (e.g., My Patients list or My Recent Patients list).

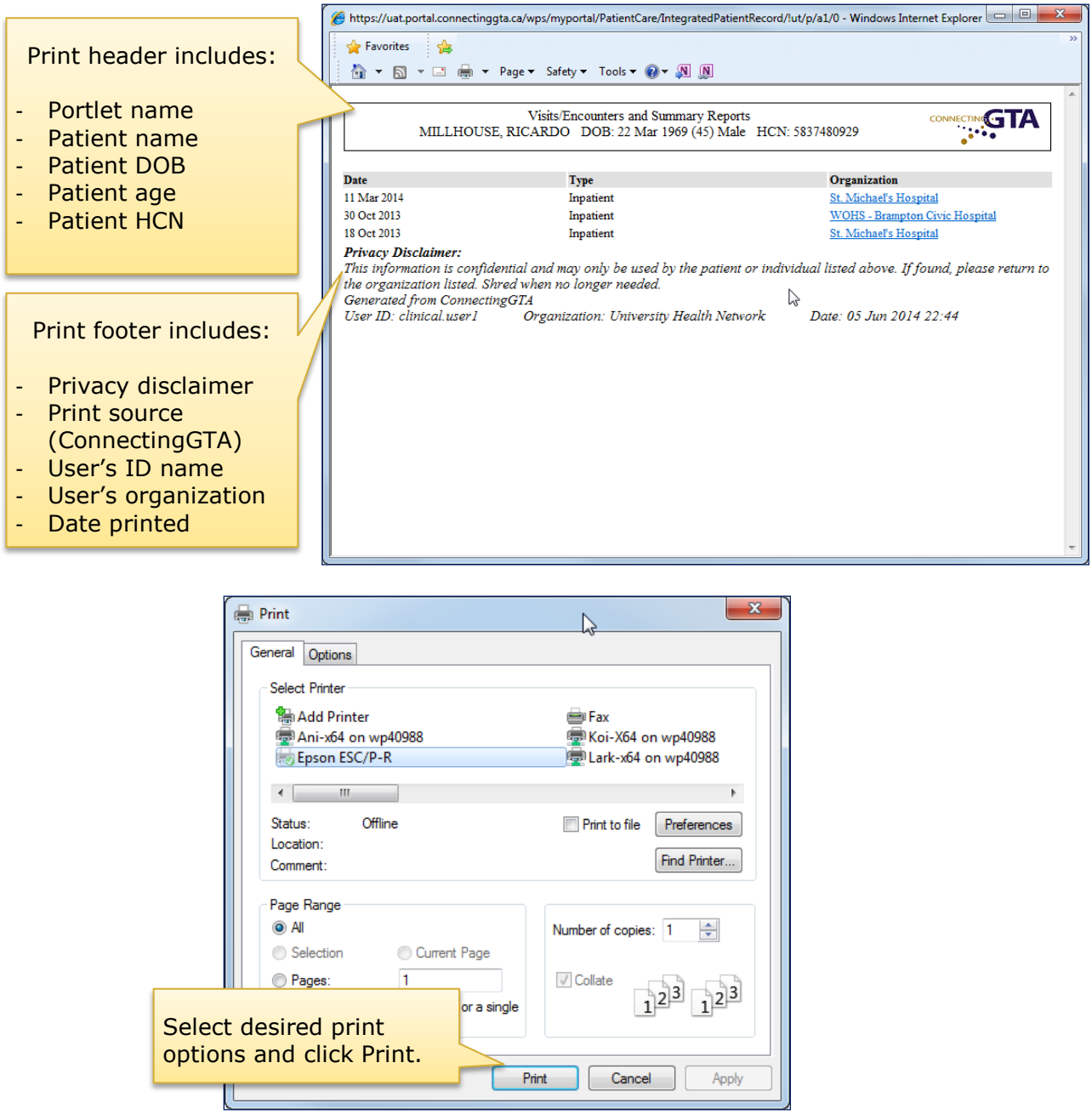


Figure 73: Print Preview and Print Dialog (Internet Explorer)

Once the print icon is selected, all data in the view prints:

a. Any filters, sorting or other data limiting component features apply to the print function and only those selected data/columns/sort options in the view (to include multiple pages if warranted) will print in a formatted document.

b. If printing from the Summary View view, only the columns displayed in this view will print (not all the columns in the full portlet).

c. If no filters or sort options are selected, all associated data for the view will print.

d. When paging is in effect, a user will be able to print all pages for the list (they are not limited to the current page being viewed).

Printing from Document Viewer

Any attachment can be printed directly from the Document Viewer.

1. Click the Print Current Tab button to print the attachment found in the current tab.

   The ConnectingGTA Header and Footer will be applied when possible, given the originating format of the document being printed.
   Note: To have the header appear at the top of every printed page, users of the Chrome web browser must select the **Headers and Footers** check box.

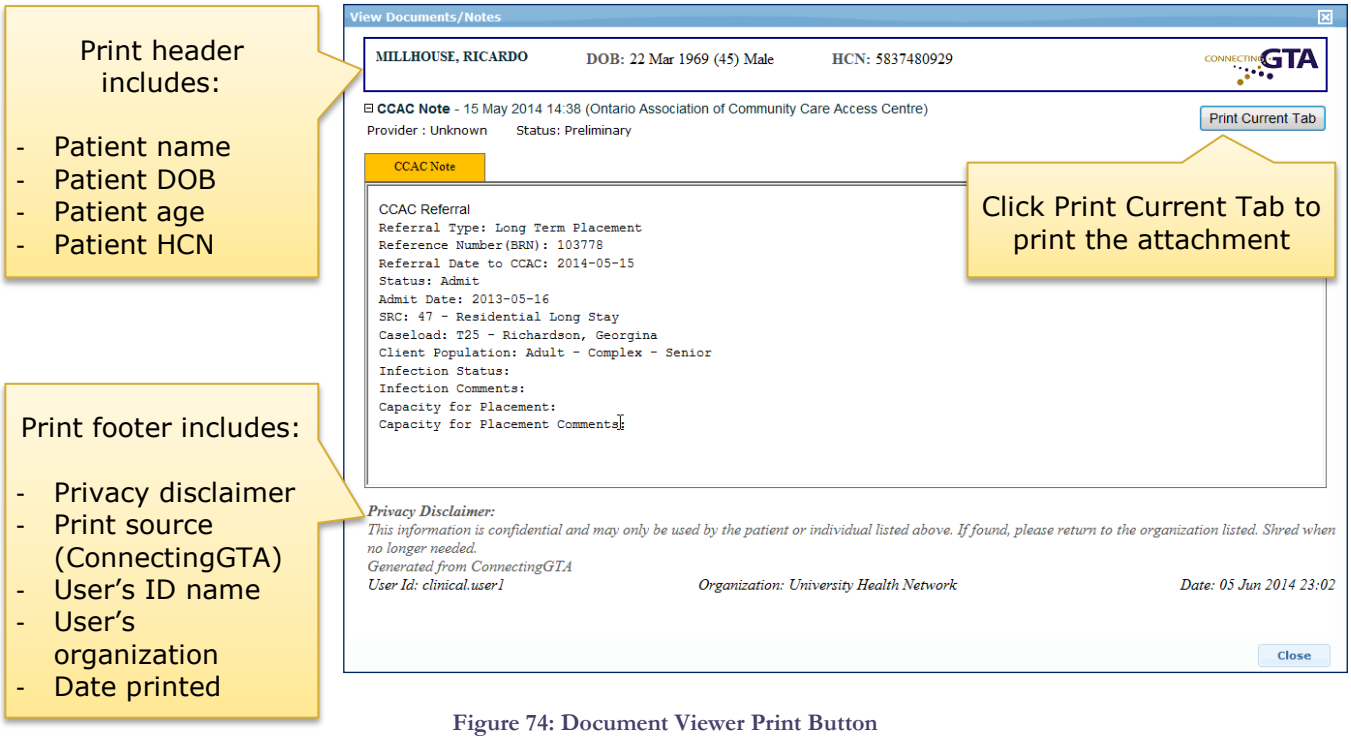

Print header includes:
- Patient name
- Patient DOB
- Patient age
- Patient HCN
Print footer includes:
- Privacy disclaimer
- Print source (ConnectingGTA)
- User's ID name
- User's organization
- Date printed
View Documents/Notes
MILLHOUSE, RICARDO
DOB: 22 Mar 1969 (45) Male
HCN: 5837480929
CCAC Note - 15 May 2014 14:38 (Ontario Association of Community Care Access Centre)
Provider : Unknown
Status: Preliminary
Print Current Tab
CCAC Note
CCAC Referral
Referral Type: Long Term Placement
Reference Number(BRN): 103778
Referral Date to CCAC: 2014-05-15
Status: Admit
Admit Date: 2013-05-16
SRC: 47 - Residential Long Stay
Caseload: T25 - Richardson, Georgina
Client Population: Adult - Complex - Senior
Infection Status:
Infection Comments:
Capacity for Placement:
Capacity for Placement Comments:
Click Print Current Tab to print the attachment
Privacy Disclaimer:
This information is confidential and may only be used by the patient or individual listed above. If found, please return to the organization listed. Shred when no longer needed.
Generated from ConnectingGTA
User Id: clinical.user1
Organization: University Health Network
Date: 05 Jun 2014 23:02
Close

Figure 74: Document Viewer Print Button

2. When the print button is clicked, the standard print dialog for the internet browser will also open. This dialog will vary depending on which internet browser is in use.

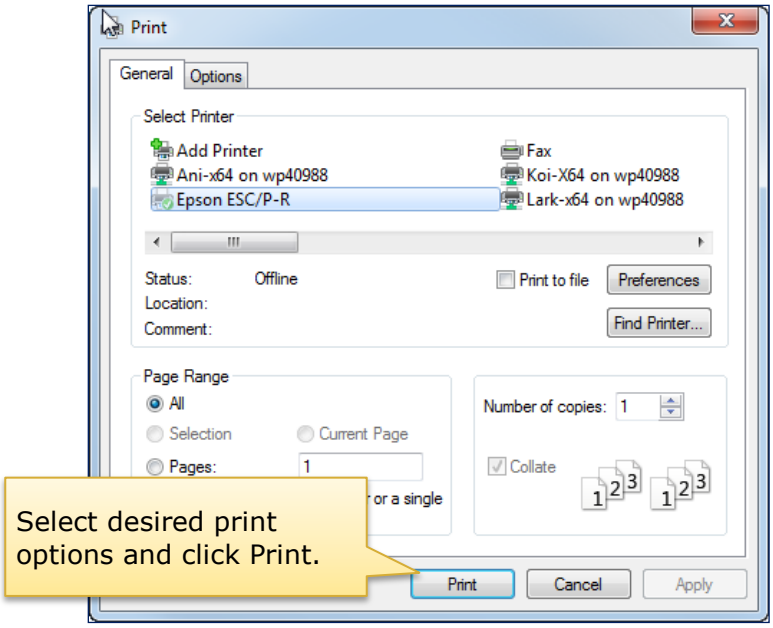


Figure 75: Print Dialog (Internet Explorer)

Print Format

- Images will be resized to fit within the width of the page when printing
- Standard format is 8 ½ by 11
- Print can be landscape or portrait to fit the document contents the best way

Find and Select Patients

My Workspace Tab

The My Workspace tab contains patient lists that enable quick and easy selection of a patient. When logging into the portal without a patient in context, this is the default page that will open.

The My Workspace page contains two components:

- My Patients list
- My Recent Patients list

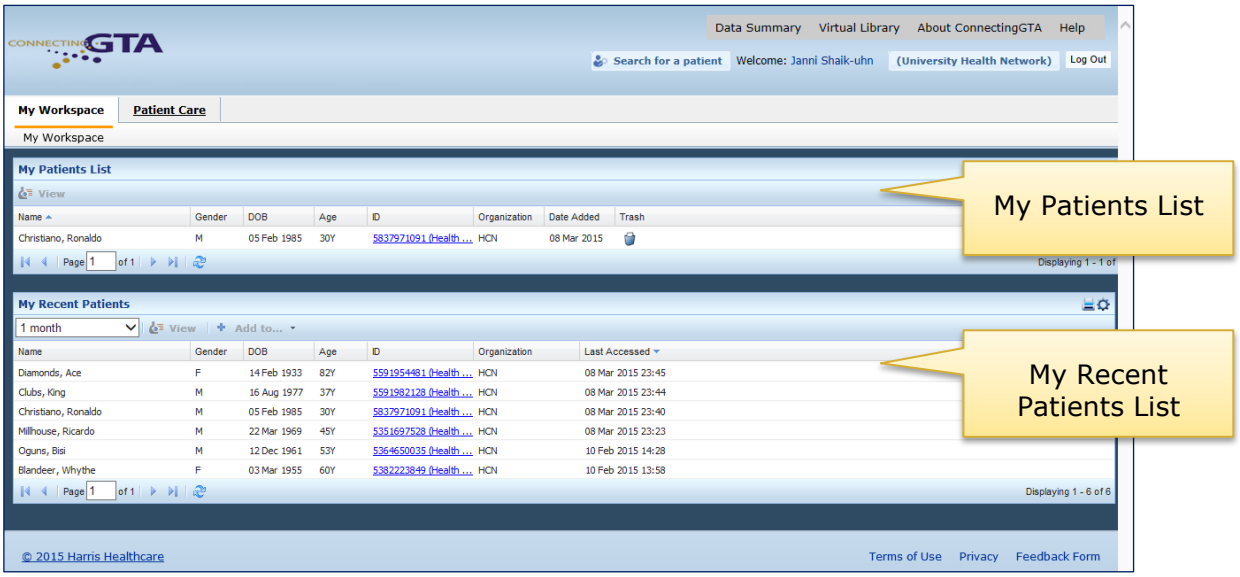


Figure 76: My Workspace Overview

My Patients List

The user can add patients to My Patients list, which appears on the My Workspace tab. The My Patients list is a convenient way to find a patient record quickly and easily.

The list contains the following patient information: name, gender, date of birth, age, ID (all IDs available in hover over), organization and date added. By default, the list is sorted in ascending order by **Name**.

My Patients List
View
Name
Gender
DOB
Age
ID
Organization
Date Added
Becks, Sam M 09 May 1988 25Y 9600883194 (Health card number) HCN
Damjier, Zohra M 28 Apr 1965 48Y 5361537425 (Health card number) HCN
DXCK, Apple M 19 Apr 1996 17Y 1011896436 (Health card number) HCN
Smith, Carla F 08 Apr 1988 25Y 9600890967 (Health card number) HCN
Smith, Daniel M 08 Apr 1984 29Y 9600953476 (Health card number) HCN
White, Winter F 20 Jan 1942 72Y 2000010534 (Health card number) HCN
Yellow, Page F 16 May 1994 19Y 2000010559 (Health card number) HCN
Page 1 of 1
Displaying 1 - 7 of 7

Figure 77: My Patients List

Putting a Patient into Context

There are two ways to put a patient into context and view that patient's data:

A. Double-click the patient row.

B. Click on the patient row to select it, then click View button.

Note: The 'View' button is not enabled until you click a row to select a patient.

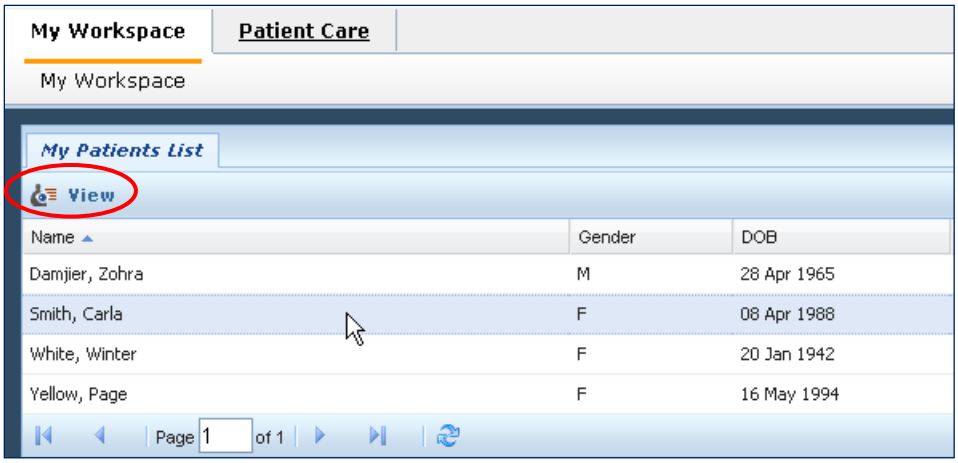


Figure 78: View Button, My Patients List

After double-clicking the patient row or clicking View button, the portal does the following:

- Opens the Patient Summary page on the Patient Care tab
- Places the patient in context
- Displays the patient demographics in the patient banner

Add Patients

To add a patient to the list, use the Add/Remove Patient button on the patient banner (Add or Remove Patient).

Remove Patients

Patients remain on the list until removed by the user.

1. With a patient row highlighted, click the Trash icon on the corresponding patient row to delete the patient from the list.

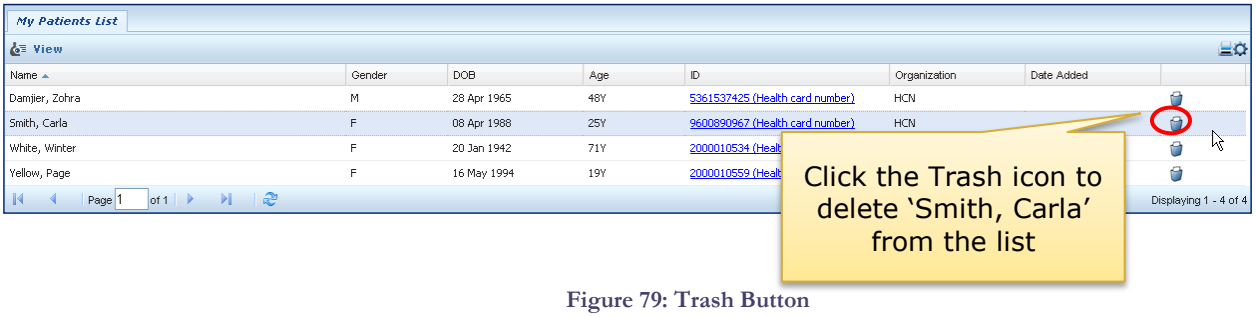
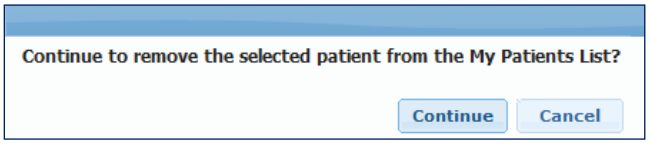


Figure 79: Trash Button

2. Click Continue. Patient will be removed from list and confirmation message will display.



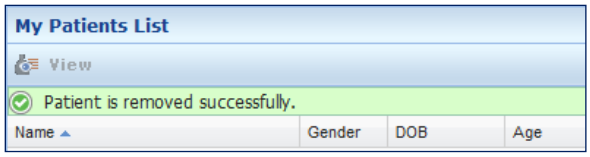


Figure 80: Remove Patient from List Confirmation

Patients can also be removed from a list using the Add/Remove Patient button on the patient banner (Add or Remove Patient).

Reminder: Patients should be removed from My Patients list when no longer required.

Preferences

By default, the My Patients list shows all available columns. Users can set preferences for My Patients list using two methods.

A. Adjust preferences directly on the list

- Adjust the width of any column (Column Width).
- Hide any of the following columns from the display: Name, Gender, DoB, Age, ID, Organization and Date Added (Hide or Show Columns).
- Sort the list by any column in ascending or descending order (Sorting)
- Filter the list by any column (Filtering).

Note: Preferences configured directly on the list are not saved after navigating away from the My Patients list.

B. Personalize the list by clicking on the User Preferences button .

- Change which columns are displayed (Modify Columns – Hide/Display)
- Change the order they are in (Modify Columns – Change Display Order)
- Select which column should be used as the default sort (Change Default Sort)
- Specify the number of data rows to display (Set Content Area Height)
- Reset to system defaults (Reset to System Default)

My Recent Patients List

The My Recent Patients list is a convenient way to find patient records that have recently been viewed by the user. The list is automatically created by the portal based on recently viewed patients. Note that:

- A patient is added to the list as soon as the patient has been put into context within the portal by the user (i.e., as soon as the user views on the patient's data on Patient Care tab)
- Patients accessed within the last year are visible on this list

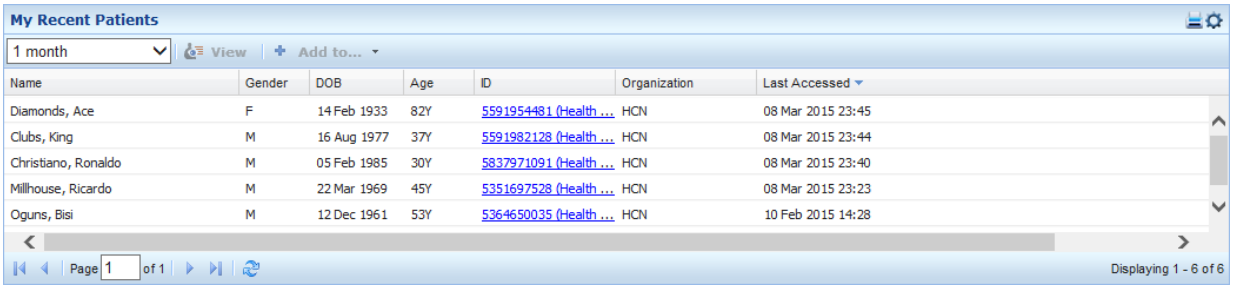

My Recent Patients
1 month
View
Add to...
Name
Gender
DOB
Age
ID
Organization
Last Accessed
Diamonds, Ace F 14 Feb 1933 82Y 5591954481 (Health ... HCN 08 Mar 2015 23:45
Clubs, King M 16 Aug 1977 37Y 5591982128 (Health ... HCN 08 Mar 2015 23:44
Christiano, Ronaldo M 05 Feb 1985 30Y 5837971091 (Health ... HCN 08 Mar 2015 23:40
Millhouse, Ricardo M 22 Mar 1969 45Y 5351697528 (Health ... HCN 08 Mar 2015 23:23
Oguns, Bisi M 12 Dec 1961 53Y 5364650035 (Health ... HCN 10 Feb 2015 14:28
Page 1 of 1
Displaying 1 - 6 of 6

Figure 81: My Recent Patients List

Note:

- Last Accessed is the date the logged-in user last accessed the patient's record
- Hover the pointer over the ID to see a list of other IDs for the patient
- A patient can be added to My Patients list using the Add to... button

(same functionality as available on the patient banner).
- By default, the list is sorted in descending order by **Last Accessed**.

Putting a Patient into Context

There are two ways to put a patient into context and view that patient's data:

A. Double-click the patient row.

B. Click on the patient row to select it, then click View button.

Note: The View button is not enabled until you click a row to select a patient.

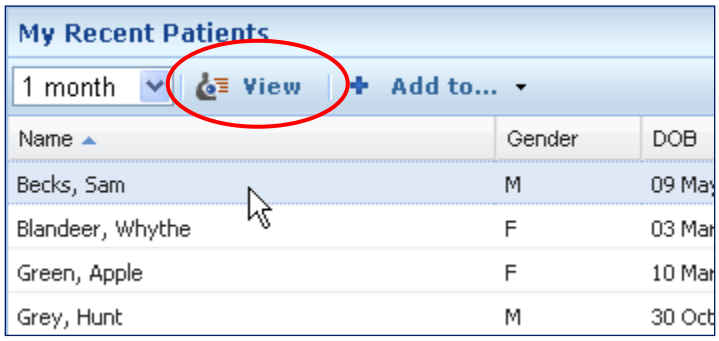


Figure 82: View Button, My Recent Patients List

After double-clicking the patient row or clicking 'View' button, the portal does the following:

- Opens the Patient Summary page on the Patient Care tab
- Places the patient in context
- Displays the patient demographics in the patient banner

Preferences

By default, the My Recent Patients list shows all available columns. Users can set preference for My Recent Patients list using two methods.

A. Adjust preferences directly on the list

- Adjust the width of any column (Column Width).
- Hide any of the following columns from the display: Name, Gender, DoB, Age, ID, Organization and Date Added (Hide or Show Columns).
- Sort the list by any column in ascending or descending order (Sorting)
- Filter the list by any column (Filtering).

Note: Preferences are not saved after navigating away from the My Recent Patients list.

B. Personalize the list by clicking on the User Preferences button

- Change which columns are displayed (Modify Columns – Hide/Display)
- Change the order they are in (Modify Columns – Change Display Order)
- Select which column should be used as the default sort (Change Default Sort)
- Specify the number of data rows to display (Set Content Area Height)
- Reset to system defaults (Reset to System Default)

Time Span

By default, the list shows patients added in the last month (30 days). To view patients added during a different time span:

1. Select the appropriate time span from the drop down list. Options are: 3 days, 5 days, 1 week (7 days), 1 month (30 days), 3 months (90 days) or 1 year (365 days).

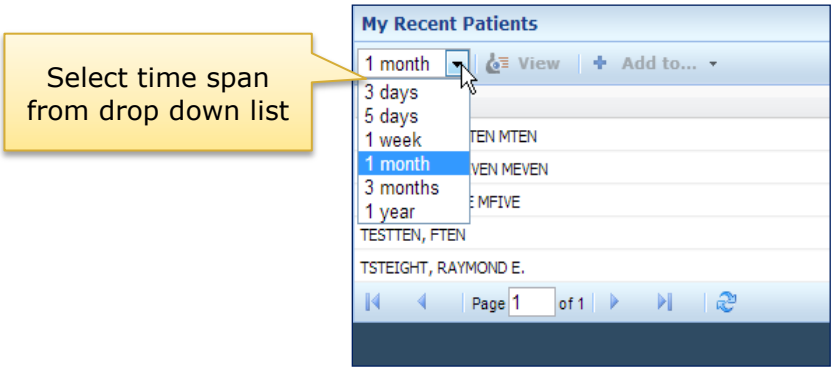


Figure 83: My Recent Patients List Time Span Selection

Find a Patient

To find a patient in the portal:

1. Click the Search for a patient button

at the top of the portal window. This button is available on both the My Workspace and Patient Care tab.

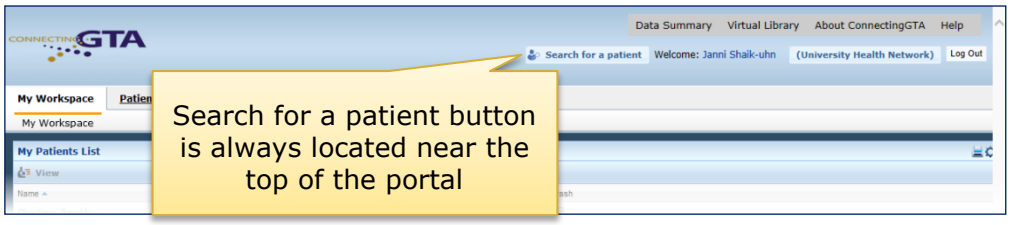


Figure 84: Search for a Patient Button

The **Patient Search and Selection** window will open. There are three search options:

A. Search by HCN *(default)*

B. Search by MRN/CHRIS Client #

C. Advanced Search

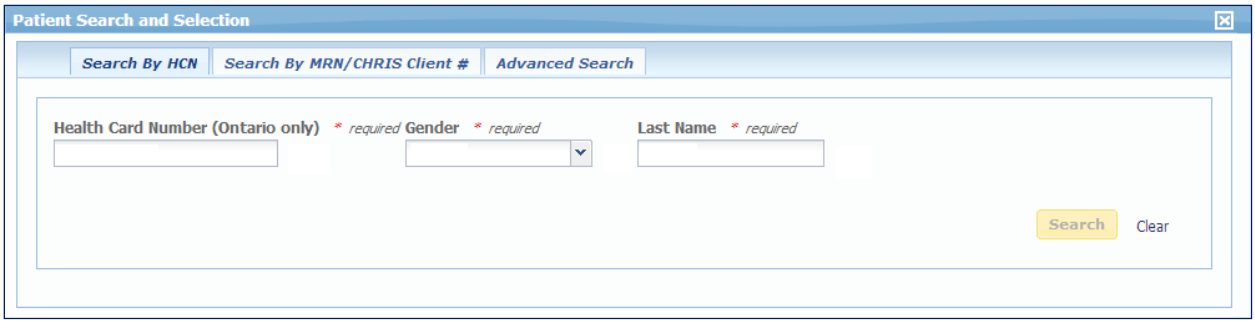


Figure 85: Patient Search and Selection Window

2. Within this window, enter the required search criteria using one of the three search options.

   For required fields, a validation checkmark will display when the data is acceptable for a search. An error message will display when further action is required.

Figure 86: Validation Messages

3. Click Search.

4. The portal will display the **Patient Search Results** table to display matched patients (Select a Patient).

Search by HCN

Search for a patient using the patient's Health Card Number by entering the following fields:

1. Health Card Number (Ontario Only)
    - E.g., "123456789"
2. Gender
    - Select gender from the drop-down list (male, female, unknown)
3. Last Name
    - If an exact match is not found, metaphone matching and fuzzy matching is used on this field
    - E.g., "Smith"
4. Click Search

Note:

- This search can only be performed with Ontario Health Card Numbers. To search for a patient without an Ontario Health Card Number use either the Search by MRN/CHRIS Client # or Advanced Search options.
- Fields are not case sensitive
- All three fields are mandatory

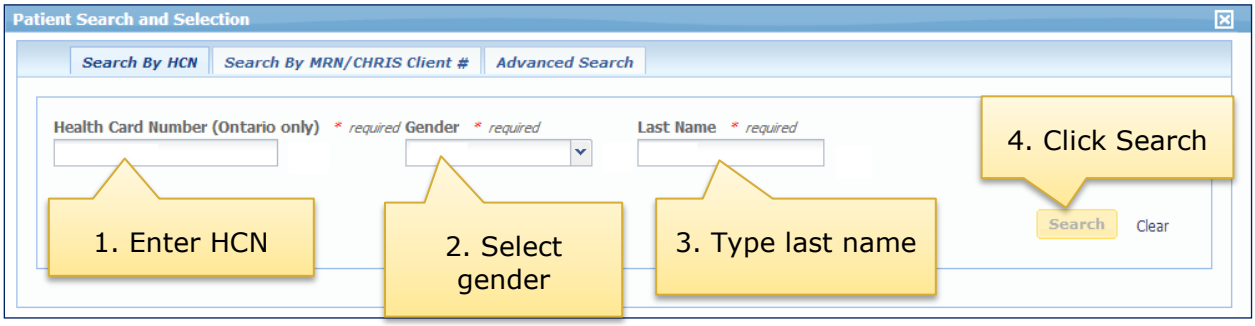


Figure 87: Search by HCN

Search by MRN/CHRIS Client

Search for a patient using the patient's Medical Record Number or CHRIS Client Number by entering the following fields:

1. Organization
    - Select the organization that is associated with the ID number to be used in the search from the drop-down list
    - E.g., "University Health Network"

2. MRN/CHRIS Client #
    - Enter the ID number
    - E.g., "A1258647"

Note:

- Both fields are mandatory
- Alphabetic characters in any ID number are case sensitive (to align with the implementation on the provincial Client Registry).

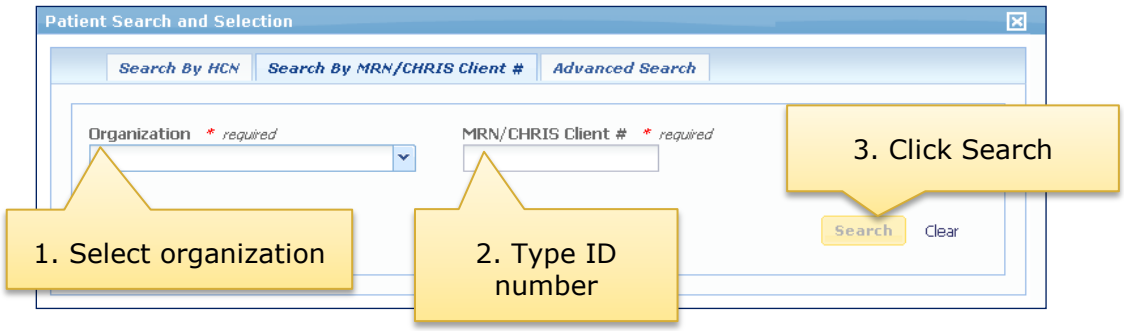


Figure 88: Search by MRN/CHRIS Client #

Advanced Search

Search for a patient using any combination of the fields listed below:

1. Enter any combination of the below fields into the search window:
    - Last Name
        - If an exact match is not found, metaphone matching and fuzzy matching is used on this field
        - E.g., "Smith"
    - First Name
        - If an exact match is not found, metaphone matching and fuzzy matching is used on this field
        - E.g., "Mary"
    - Middle Name
        - If an exact match is not found, metaphone matching and fuzzy matching is used on this field
        - E.g., "Louise"
    - Gender
        - Select gender from the drop-down list (male, female, unknown)
    - DOB (Date of Birth)
        - Enter the patient's date of birth by typing the date directly into the field or using the calendar widget (Calendar)
        - E.g., "01JAN1975"
    - Street Address
        - Enter the patient's street address
        - If an exact match is not found, sub-string matching is used on this field
        - E.g., "50 Maple Rd."
    - City
        - Enter the patient's city of residence

- If an exact match is not found, sub-string matching is used on this field
- E.g., "Toronto"

- Postal Code
  - Enter the Canadian or International postal code for the patient, and exact match is required
  - E.g., "X1X 6Y6"
- Phone Number
  - Enter the patient's ten digit phone number (including the area code)
  - E.g., "416-555-1234"
- Organization
  - Select an Organization from the drop-down list

2. Click Search.

Note:

- A minimum of one field is required
- Fields are not case sensitive

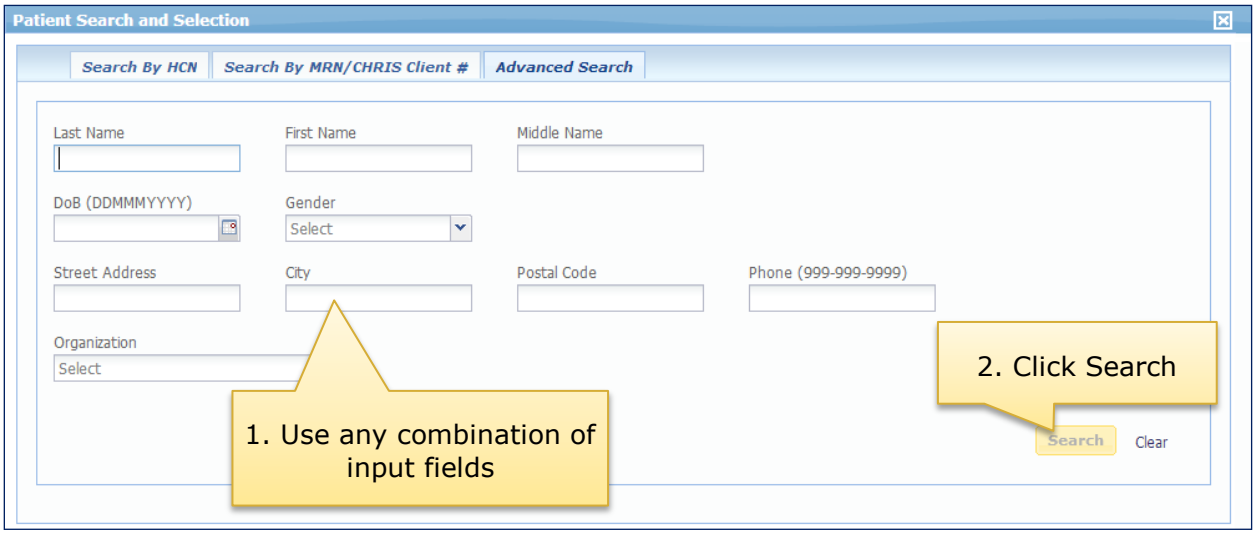


Figure 89: Advanced Search

Select a Patient

After entering patient data into one of the available search options and clicking Search, the **Patient Search Results** table will display at the bottom of the window.

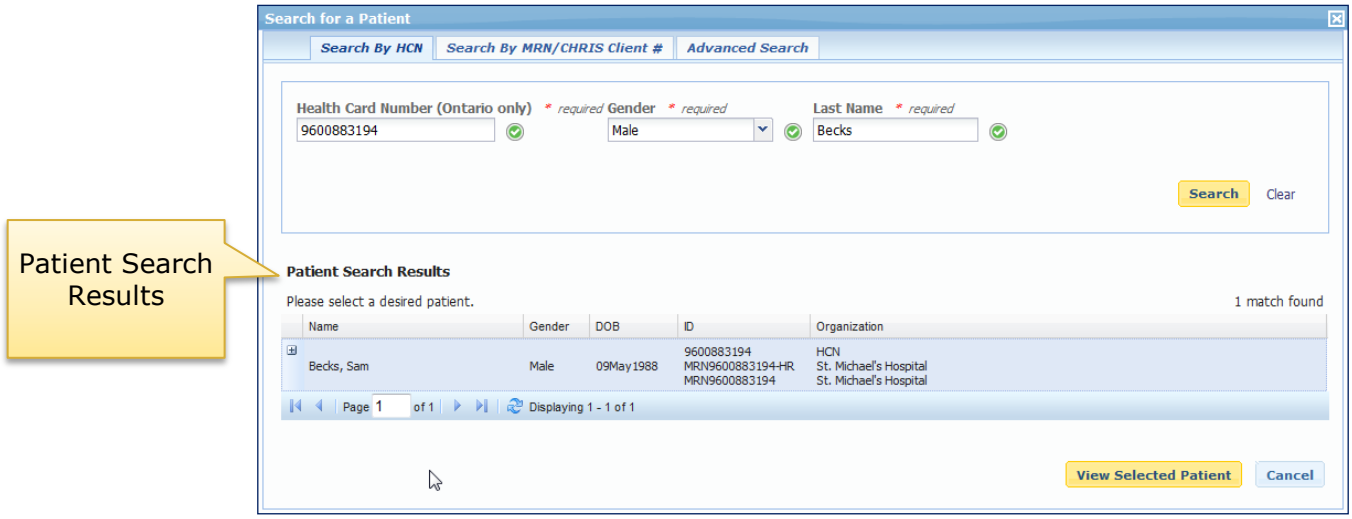


Figure 90: Patient Search Results Table

Name, Gender, DOB, ID numbers and address information is always returned for all three search options. The address and phone numbers are available to display on an expanded view.

Figure 91: Expanding the Search Results

If there are no patients that match the search criteria, the portlet will display 'No patient for these criteria' in the **Patient Search Results** table.

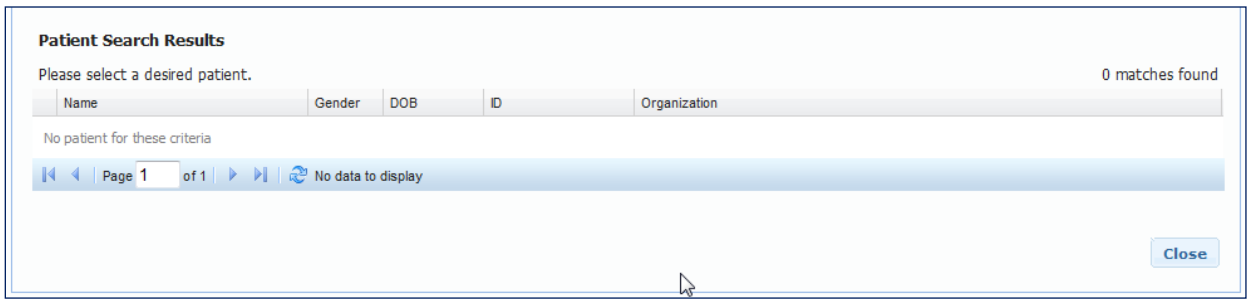


Figure 92: No Patient Search Matches

Note: If more than 5 patients are matched to the entered search criteria, no results will be returned. Users will be prompted with a message to further refine their search criteria and search again. To clear the data populated in the search fields, users must select the Clear button.

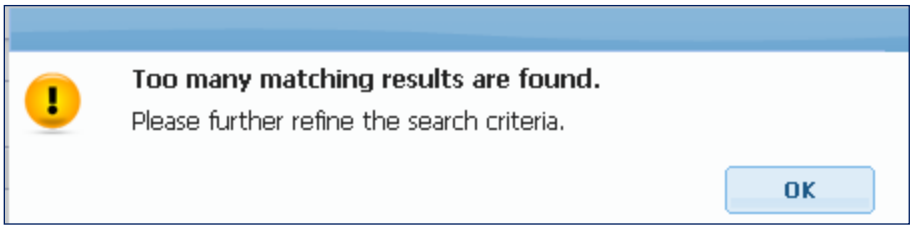


Figure 93: Error Message - Too Many Results

Note: If there are multiple instances of a single patient, no results will be returned. Instead, users will be shown an error message.

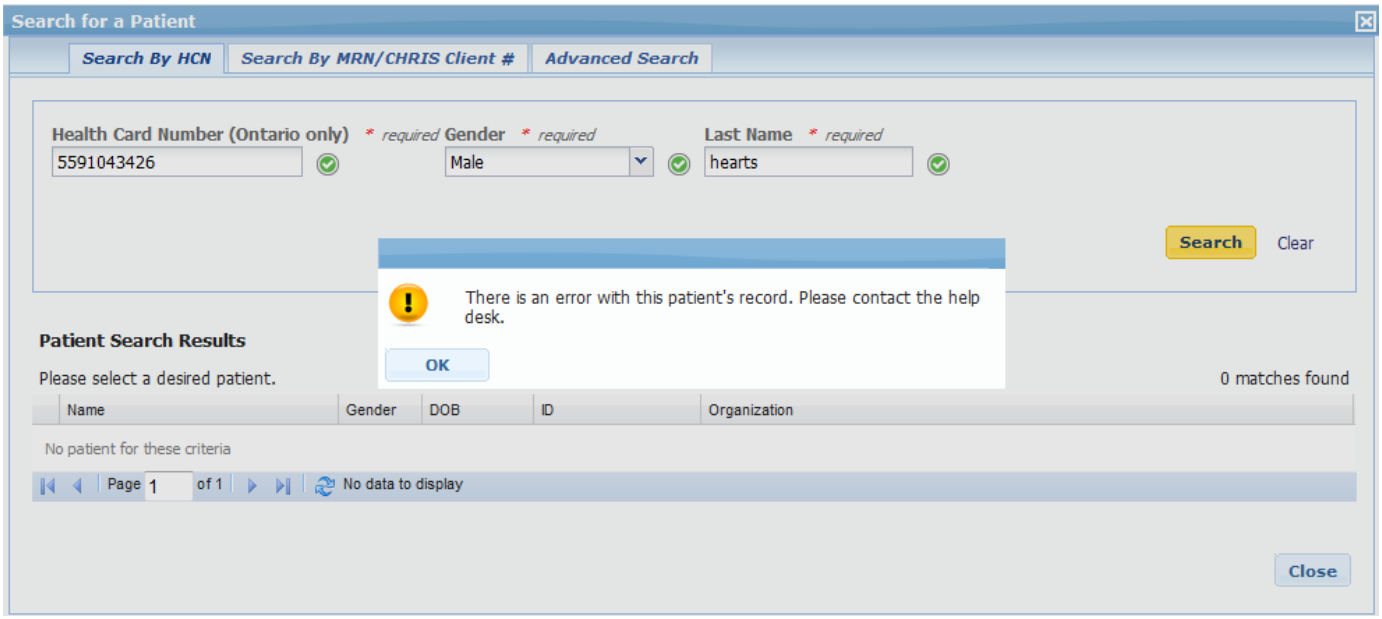


Figure 94: Error Message - Error with Patient's Record

Putting a Patient into Context

To view the patient's data, the user must put the patient into context. This can be done two ways:

A. Click to select the row for the correct patient and then click View Selected Patient -OR-
B. Double-click on the row for the chosen patient.

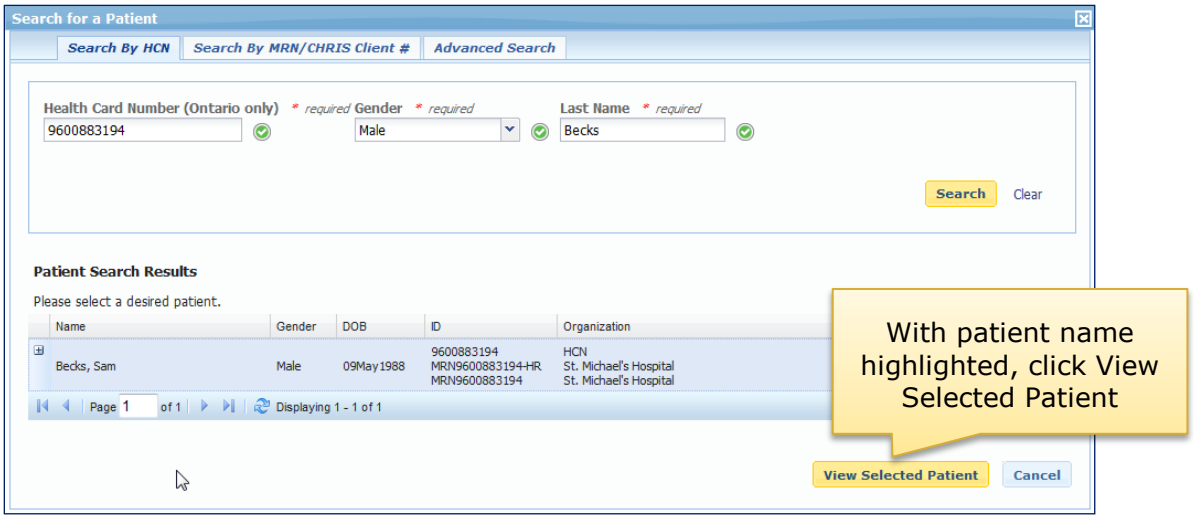


Figure 95: View Selected Patient Button

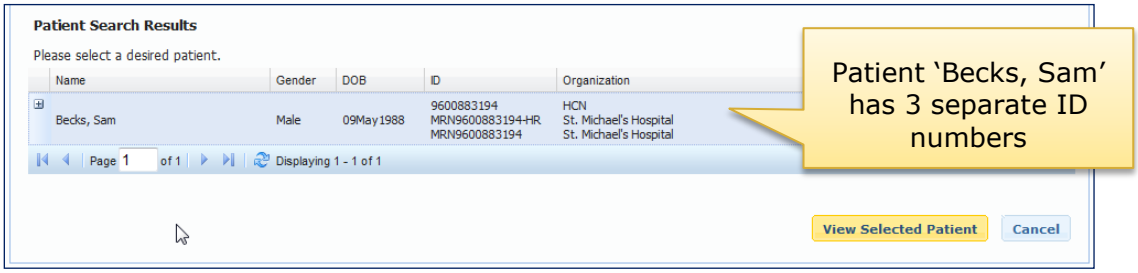
Upon patient selection:

- The search window is closed
- The patient banner is updated to reflect the patient in context
- The user lands on the Summary View view for that patient (or the user's custom default view, if applicable)

Linked Records

Search results may come from one or more sources, therefore a single patient may have multiple MRNs and/or CHRIS Client #s in addition to a Health Card Number (HCN). In this case of linked records (multiple IDs associated to the same patient), all of the patient's IDs (and each associated Organization) will display.

All IDs (HCN, MRNs, and CHRIS Client #s) for a patient will display alongside the master set of the patient's demographic information.



Patient Search Results Preferences

When the patient search results are displayed, the results are displayed using all available columns and will be sorted in descending order by **Name**. The following display preferences are available:

- Sort the table by Name, Gender, or DoB, in ascending or descending order.
- Adjust the width of any column

Note: Preferences are not saved when the 'Patient Search and Selection' window closes.

Clinical Data Components

Timeline

The timeline controls the date range of data that displays in components on the Patient Care tab. Data displayed within each portlet is within the selected time frame, unless otherwise specified.

The default time range is 30 days back from today, with the most recent date at the left end of the Timeline. However, the user can choose to have the most recent date at either end of the Timeline (Timeline Preferences).

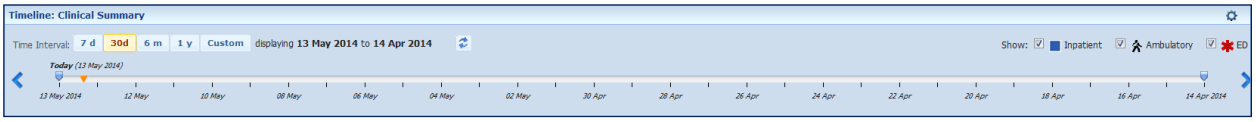

Timeline: Clinical Summary
Time Interval: 7 d 30d 6 m 1 y Custom displaying 13 May 2014 to 14 Apr 2014
Show: Inpatient Ambulatory ED
Today (13 May 2014)
13 May 2014 12 May 10 May 08 May 06 May 04 May 02 May 30 Apr 28 Apr 26 Apr 24 Apr 22 Apr 20 Apr 18 Apr 16 Apr 14 Apr 2014

Figure 96: Timeline (30 days)

When today's date appears on the Timeline, an orange indicator is used to indicate the current date/time position. Additionally, when the Timeline range is short enough, today's date will be represented for the full day indicating both the start and end of the day.

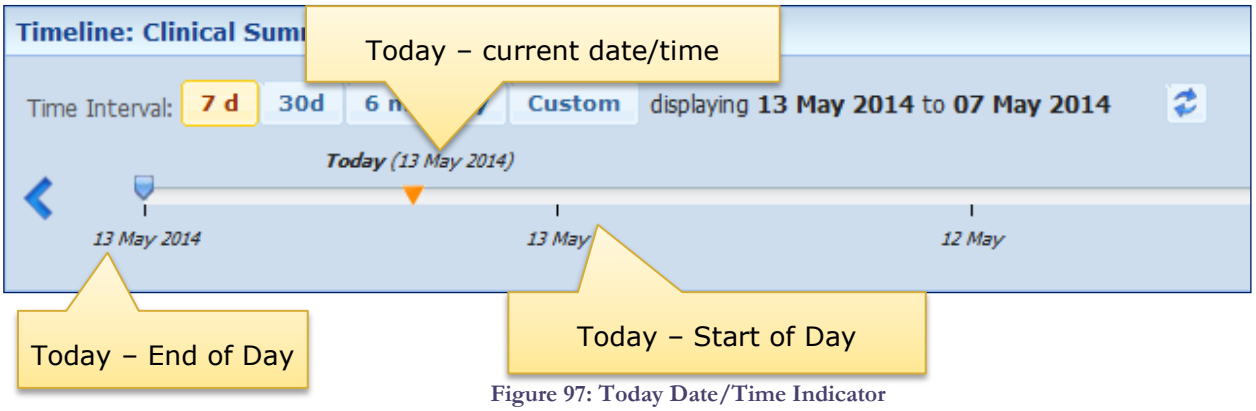

Timeline: Clinical Sum
Today – current date/time
Time Interval: 7 d 30d 6 n Custom displaying 13 May 2014 to 07 May 2014
Today (13 May 2014)
13 May 2014
13 May
12 May
Today – End of Day
Today – Start of Day

Figure 97: Today Date/Time Indicator

Timeline Preferences

The user can choose to have the most recent date at either end of the Timeline.

1. Click on the User Preferences icon on the right side of the Timeline.

Figure 98: User Preferences Icon

2. In the User Preferences dialog, select which results to display on the left side of the Timeline as shown in the dialog below. To change today's date to display on the right side of the Timeline, select Oldest results and click Save. This change will persist until the user changes it again.

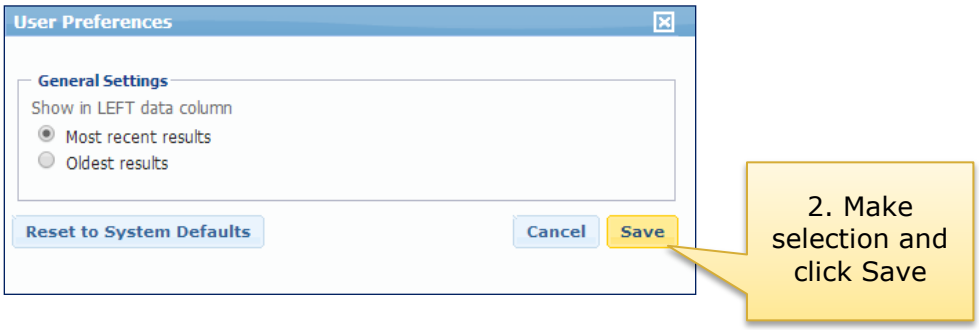


Figure 99: User Preferences Selection

Timeline Control Mechanisms

When first displayed, the time range defaults to 30 days back from today. However, there are multiple ways that a user can change the time range being displayed:

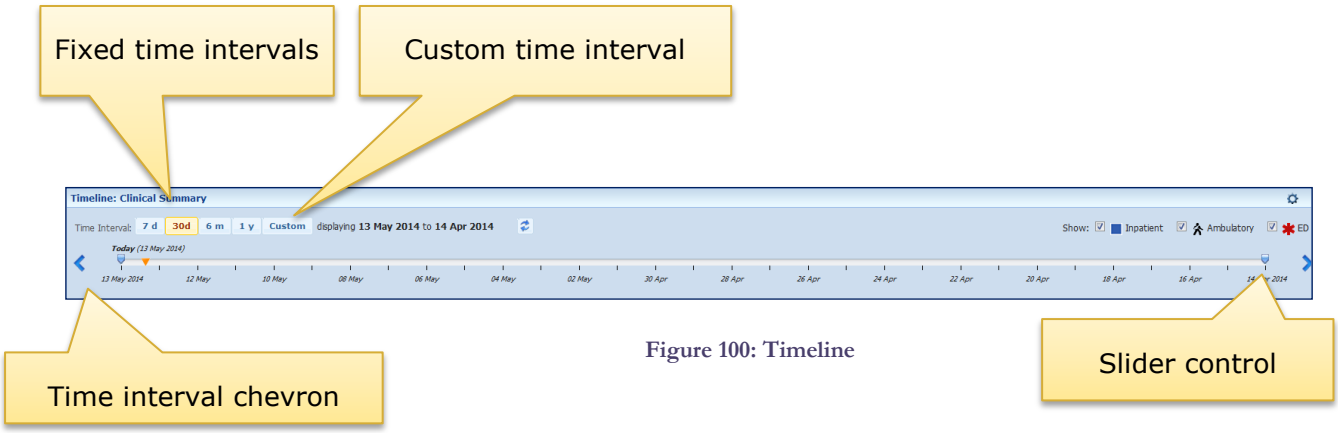

Fixed time intervals
Custom time interval
Timeline: Clinical Summary
Time Interval: 7 d 30d 6 m 1 y Custom displaying 13 May 2014 to 14 Apr 2014
Show: Inpatient Ambulatory ED
Time interval chevron
Slider control

Figure 100: Timeline

Note: In order to populate the complete data set across all portlets, the Timeline will be greyed out while data is loading. The user will not be able to interact with the Timeline until all portlets have completed loading.

Fixed Time Intervals

1. Select a time interval button to set the time range (7 days, 30 days, 6 months, 1 year).

Figure 101: Fixed Time Intervals

Custom Time Interval

1. Click the Custom button to open the custom date range dialog.
2. Enter the From and To dates for the custom time range (Calendar).

   Note: independent of which direction your timeline is displaying, the interval start date will always be entered into the From field and the interval end date will always be entered into the To field.

3. Click Go.

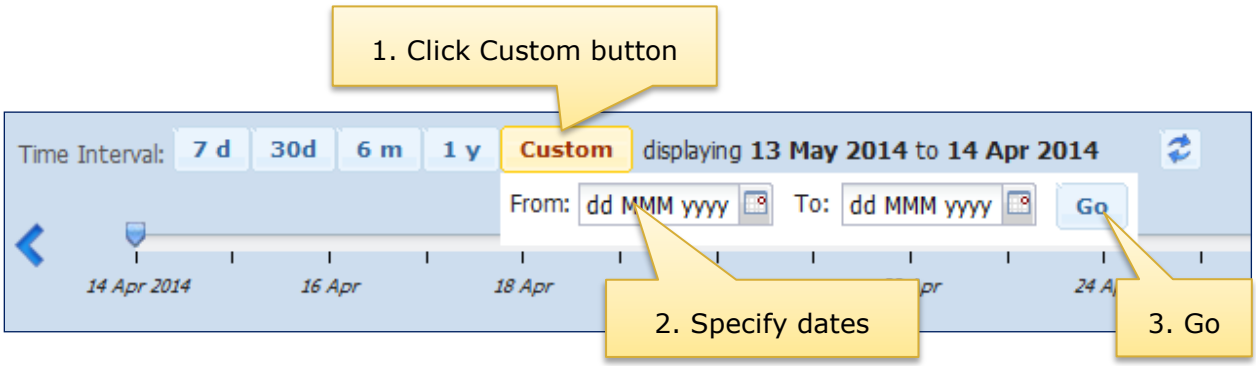

1. Click Custom button
Time Interval: 7 d 30d 6 m 1 y Custom displaying 13 May 2014 to 14 Apr 2014
From: dd MMM yyyy
To: dd MMM yyyy
Go
14 Apr 2014
16 Apr
18 Apr
2. Specify dates
3. Go

Figure 102: Custom Time Interval

Time Interval Chevrons

1. Click the arrow shaped chevron at either end of the Timeline to view the previous or next time interval of the same duration as the currently selected time interval.

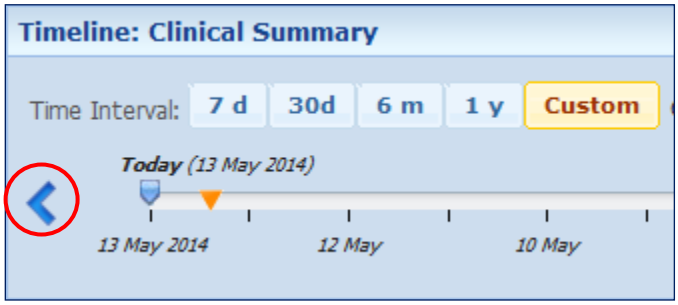


Figure 103: Arrow Shaped Chevron

Slider Controls

1. Drag the beginning and/or ending sliders to change the time range within what is currently displayed.

In the example below, the user's original time frame was 30 days. By using the slider controls on either end of the Timeline, the user was able to further refine the time range and hence the data displayed in all of the portlets.

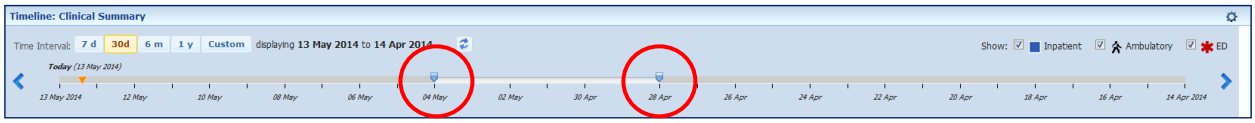


Figure 104: Reducing the Selected Time Range

Encounter Selection

1. Click on an inpatient icon directly on the Timeline to display data ranging from two weeks prior to and two weeks after the selected encounter.

   Note: If the inpatient visit is ongoing (there is no discharge date), clicking on the icon will display data ranging from two weeks prior to and two weeks after the **start date** of the inpatient visit. In order to avoid missing any data that may fall outside of this range, use the Custom Time Interval to select the appropriate range.

2. Click on an ambulatory icon directly on the Timeline to display data ranging from two weeks prior to and two weeks after the start date of the encounter.

3. Click on an emergency icon directly on the Timeline to display data ranging from two weeks prior to and two weeks after the start date of the encounter.

   Note: This does not limit the information in the portlets to be specific to the chosen encounter, only the approximate date range of the encounter data.

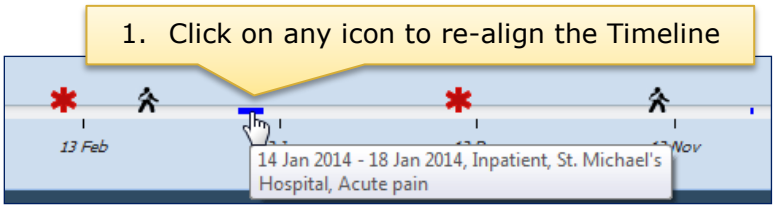


Figure 105: Encounter Selection

Display of Encounters

Three types of encounters display on the Timeline: inpatient, ambulatory and emergency.

The inpatient encounter bar, the blue bar displayed above the Timeline, shows the length of the encounter. The ambulatory and emergency visits are each represented by an icon.

The user can choose to hide any of the visit types from the Timeline display by un-checking the appropriate visit type in the Timeline legend. This WILL NOT change the data that displays in any of the portlets, only the icons that appear on the Timeline.

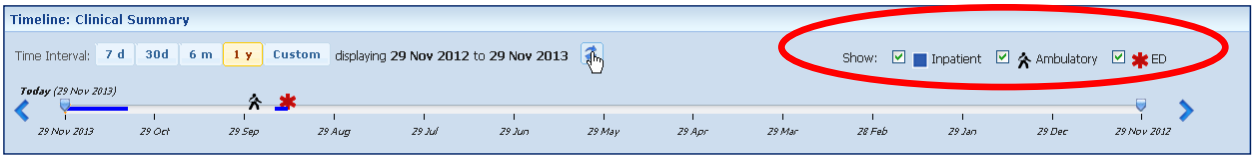

Timeline: Clinical Summary
Time Interval: 7 d 30d 6 m 1 y Custom displaying 29 Nov 2012 to 29 Nov 2013
Show: Inpatient Ambulatory ED
Today (29 Nov 2013)
29 Nov 2013 29 Oct 29 Sep 29 Aug 29 Jul 29 Jun 29 May 29 Apr 29 Mar 28 Feb 29 Jan 29 Dec 29 Nov 2012

Figure 106: Encounter Legend

Hovering over any encounter will display a tooltip with more information about the encounter, such as:

- Visit Date
- Visit Type
- Reason for Visit
- Facility Visited

If multiple visits overlap a particular time frame, the hover over information will display the earliest encounter

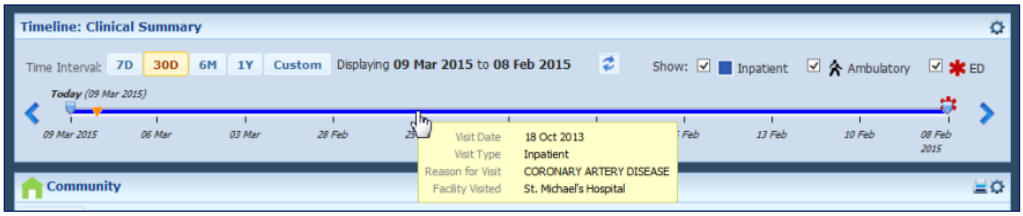

Timeline: Clinical Summary
Time Interval: 7D 30D 6M 1Y Custom Displaying 09 Mar 2015 to 08 Feb 2015
Show: Inpatient Ambulatory ED
Today (09 Mar 2015)
09 Mar 2015 06 Mar 03 Mar 28 Feb 13 Feb 10 Feb 08 Feb 2015
Visit Date 18 Oct 2013
Visit Type Inpatient
Reason for Visit CORONARY ARTERY DISEASE
Facility Visited St. Michael's Hospital
Community

Figure 107: Encounter Tooltip

Timeline Relationship to Portlet Dates

* indicates the date field(s) that is used by the Timeline for the portlet

Portlet Name	Tab Name (if applicable)	Date(s) Included	Date Description	Relationship to Timeline
Visits/Encounters		Date*	Visit date or encounter start date; Display only date not time	Display any visit/encounter that has begun, ended or is ongoing within the selected time range
		Discharge Date*	Date of discharge for the inpatient encounter, not available for outpatient encounter types; Display only date not time	
Documents/Notes		Dictation Date/Time *	Date/time document was dictated	Display any document/note with a dictation date within the selected time range
		Admit Date/Time	Admit date the document/note is associated with	
		Discharge Date/Time	Discharge date the document/note is associated with	
Lab Results	All Chemistry Hematology Blood Bank Pathology Microbiology Other	Collection Date/Time *	Specimen collected date/time	Display any lab result with a collection date/time within the selected time range
		Last Updated Date/Time	Date/time lab result was last updated	
DI Reports		Procedure Date/Time *	Observation date/time	Display any report with a procedure date within the selected time range

Other Results	All Cardiology	Procedure Date/Time *	Observation date/time	Display any result with a procedure date within the selected time range
Community		Referral Start Date*	Equivalent to encounter admit date	Display any referral that has begun, ended or is ongoing within the selected time range (TBC)
		Referral Close Date*	Equivalent to encounter discharge date	

Table 5: Timeline Relationship to Portlet Dates

Overriding Consent

A patient can request to have all or some of their personal health information (PHI) blocked. This block is referred to as a Consent Directive which can be requested by a patient or substitute decision maker (SDM). This Consent Directive can be applied to PHI available in the Clinical Data Repository (CDR), the Ontario Laboratories Information System (OLIS), or both.

Types of Consent Directives:

1. **Global:** Restricting access to all PHI in the Clinical Data Repository (CDR) for that patient (except demographic data in the Client and Consent registries).
2. **Domain:** Restricting access to all PHI in an application or domain (according to the directives registered in the application or domain), i.e. from OLIS in labs portlet.
3. **Health Information Custodian (HIC) Record:** Restricting or allowing access to all PHI from a specific site/facility for a specific patient
4. **Health Information Custodian (HIC) Agent:**
   a. All Agents - Restricting or allowing all users from a specific site/facility to access the patient's PHI in the CDR
   b. (Single) Agent: Restricting or allowing a specific user (individual person) to access the patient's PHI in the CDR

When consent directives are applied for a patient and resultantly PHI is blocked, the following will appear within the portlets:

1. A message will appear in every portlet with blocked PHI: *"Warning: Some or all records are blocked due to a patient consent directive."*
2. Yellow banner providing the option to override the consent directive

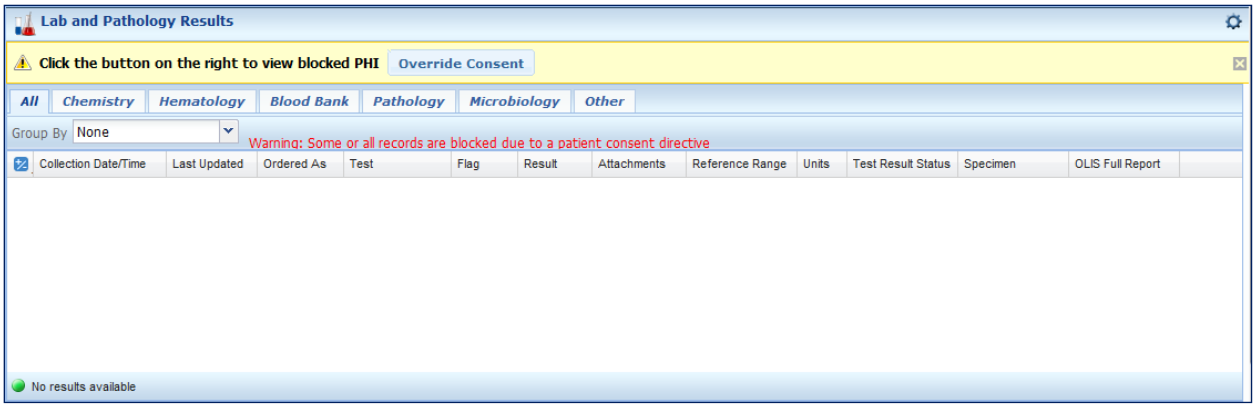


Figure 108: Display of Blocked PHI

Consent directives are only applied on the Patient Care tab, not before. Therefore they will never prevent a patient from being found in a search or displaying in patient lists.

Viewing Unblocked Data Only

It is possible that only selective PHI for a patient is blocked. If a Consent Directive is applied to only part of the PHI, the user will still be able to access the PHI that is not protected by a Consent Directive. Messages will continue to display indicating that some or all results may be blocked as a reminder.

Note: Clicking the 'x' on the yellow banner will remove the option to override consent from the portlet temporarily. To bring it back, the portlet must be refreshed by clicking the refresh icon on the portlet or on the timeline. The simplest approach is to leave the yellow banner displayed at all times.

Overriding Consent

Note: Overriding consent will override all active consent directives for the patient – it is not limited to PHI in the current portlet.

If an override of consent is required:

1. Click the Override Consent button to display the dialog.

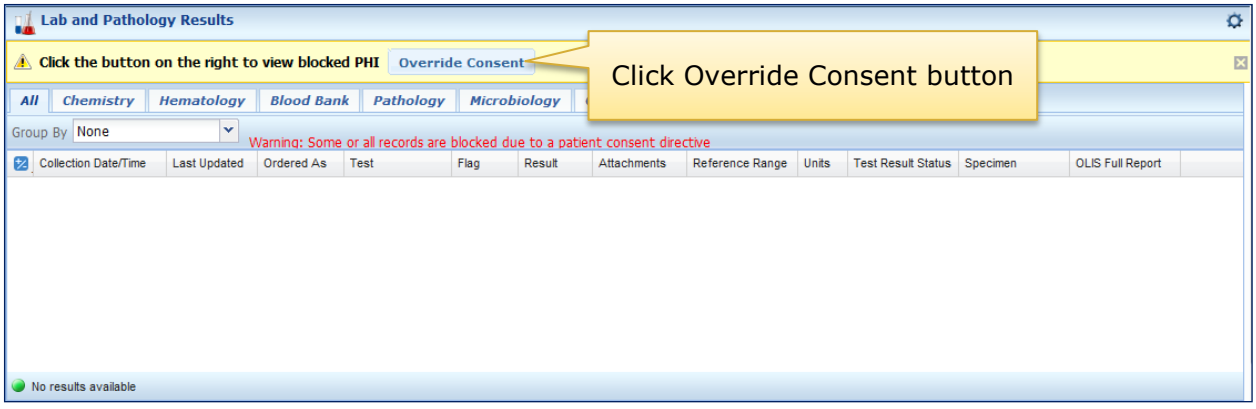


Figure 109: Override Consent Button

2. Select one of the three available override reasons:
   - Option 1: Express consent obtained from patient (Option 1)
   - Option 2: Express consent obtained from a Substitute Decision Maker (SDM) (Option 2)
   - Option 3: Significant Risk of Serious Bodily Harm (Option 3)

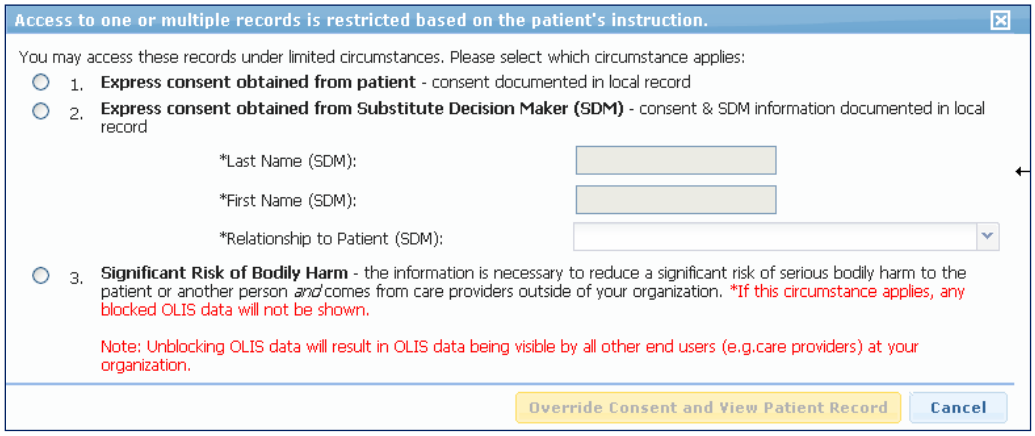

Access to one or multiple records is restricted based on the patient's instruction.
You may access these records under limited circumstances. Please select which circumstance applies:
1. Express consent obtained from patient - consent documented in local record
2. Express consent obtained from Substitute Decision Maker (SDM) - consent & SDM information documented in local record
*Last Name (SDM):
*First Name (SDM):
*Relationship to Patient (SDM):
3. Significant Risk of Bodily Harm - the information is necessary to reduce a significant risk of serious bodily harm to the patient or another person and comes from care providers outside of your organization. *If this circumstance applies, any blocked OLIS data will not be shown.
Note: Unblocking OLIS data will result in OLIS data being visible by all other end users (e.g.care providers) at your organization.
Override Consent and View Patient Record
Cancel

Figure 110: Override Consent Dialog

Note: When you choose the reason, you will not be able to change it within the window for which the override is valid (i.e., override is valid until 11:59pm on the day that the override is conducted in the ConnectingGTA Solution). If you perform an override after the override period, you must choose the reason again – the same or another.

Overriding Consent: Express Consent Obtained from Patient

1. Click Express consent obtained from patient option.
2. Click Override Consent and View Patient Record button to complete the override.

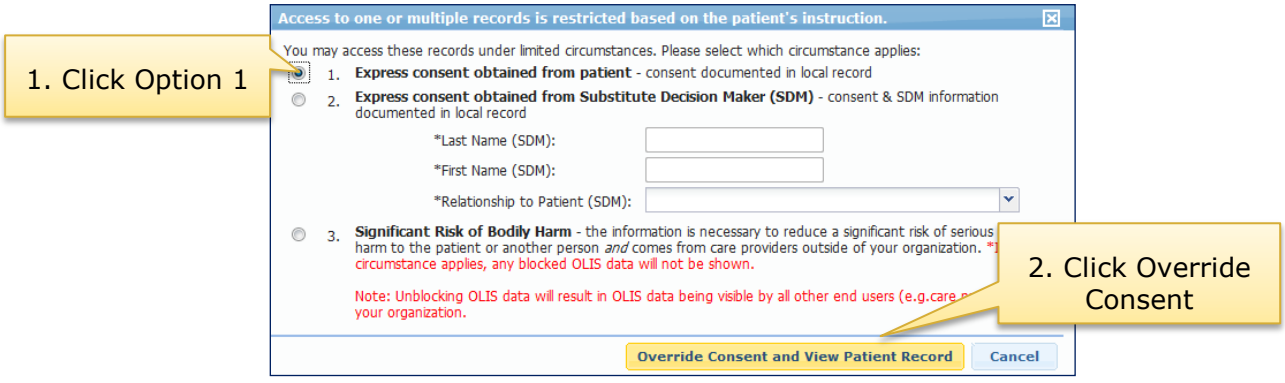

1. Click Option 1
Access to one or multiple records is restricted based on the patient's instruction.
You may access these records under limited circumstances. Please select which circumstance applies:
1. Express consent obtained from patient - consent documented in local record
2. Express consent obtained from Substitute Decision Maker (SDM) - consent & SDM information documented in local record
*Last Name (SDM):
*First Name (SDM):
*Relationship to Patient (SDM):
3. Significant Risk of Bodily Harm - the information is necessary to reduce a significant risk of serious
harm to the patient or another person and comes from care providers outside of your organization.
circumstance applies, any blocked OLIS data will not be shown.
Note: Unblocking OLIS data will result in OLIS data being visible by all other end users (e.g.care
your organization.
2. Click Override Consent
Override Consent and View Patient Record
Cancel

Figure 111: Consent Override, Option 1

Overriding Consent: Express consent obtained from a Substitute Decision Maker (SDM)

1. Click Express consent obtained from a Substitute Decision Maker (SDM) option.
2. Document SDM first name and last name.

Note: The first name has a maximum length of 20 characters. The last name has a maximum length of 30 characters. Please ensure the text entered into these fields is within these limits.

3. Select the SDM's relationship to the patient from the Relationship to Patient (SDM) drop down menu
4. Click Override Consent and View Patient Record button to complete the override.

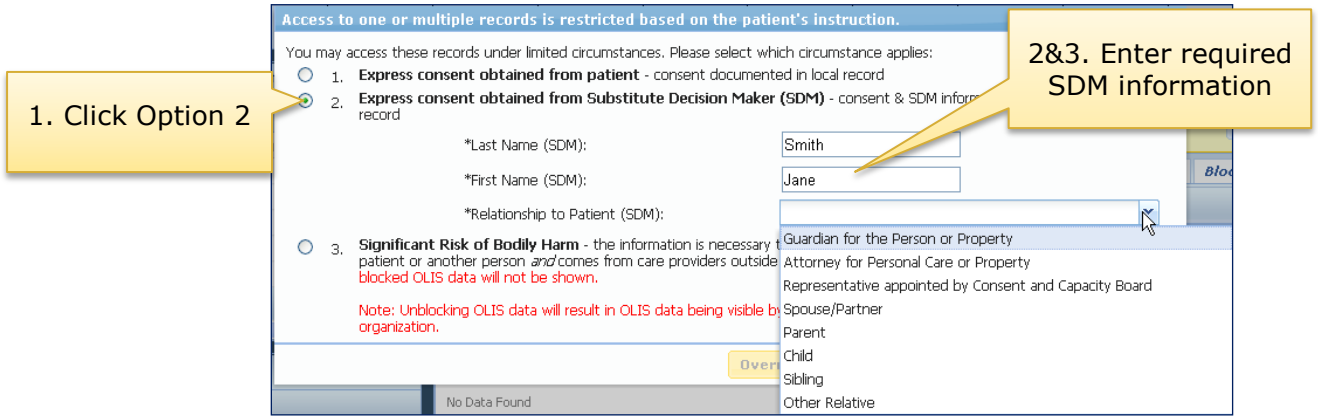

1. Click Option 2
2&3. Enter required SDM information
Access to one or multiple records is restricted based on the patient's instruction.
You may access these records under limited circumstances. Please select which circumstance applies:
1. Express consent obtained from patient - consent documented in local record
2. Express consent obtained from Substitute Decision Maker (SDM) - consent & SDM inform
record
*Last Name (SDM):
Smith
*First Name (SDM):
Jane
*Relationship to Patient (SDM):
3. Significant Risk of Bodily Harm - the information is necessary t
patient or another person and comes from care providers outside
blocked OLIS data will not be shown.
Note: Unblocking OLIS data will result in OLIS data being visible b
organization.
No Data Found
Guardian for the Person or Property
Attorney for Personal Care or Property
Representative appointed by Consent and Capacity Board
Spouse/Partner
Parent
Child
Sibling
Other Relative

Figure 112: Consent Override, Option 2

Overriding Consent: Significant Risk of Serious Bodily Harm

1. Click Significant Risk of Serious Bodily Harm option.
2. Click Override Consent and View Patient Record button to complete the override.

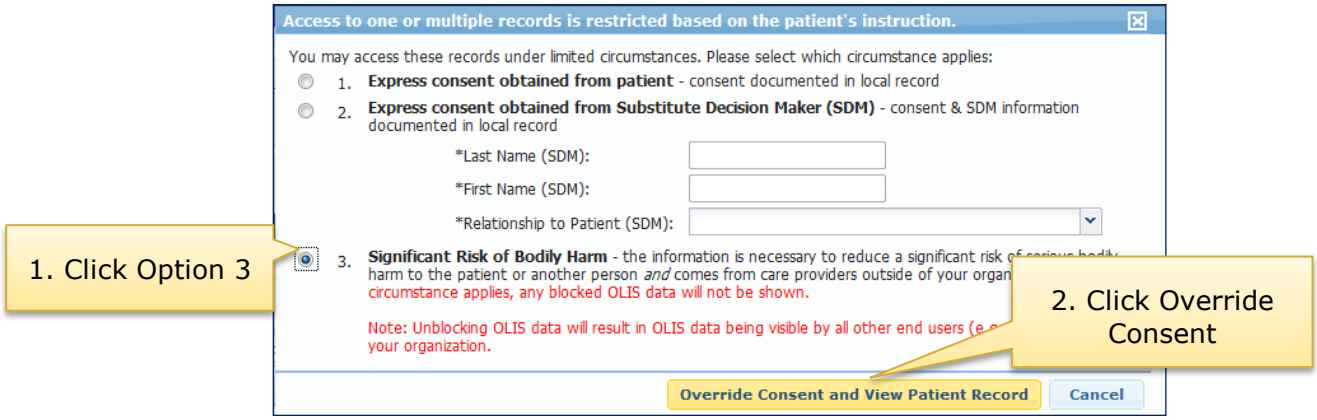

1. Click Option 3
2. Click Override Consent
Access to one or multiple records is restricted based on the patient's instruction.
You may access these records under limited circumstances. Please select which circumstance applies:
1. Express consent obtained from patient - consent documented in local record
2. Express consent obtained from Substitute Decision Maker (SDM) - consent & SDM information documented in local record
*Last Name (SDM):
*First Name (SDM):
*Relationship to Patient (SDM):
3. Significant Risk of Bodily Harm - the information is necessary to reduce a significant risk
harm to the patient or another person and comes from care providers outside of your organ
circumstance applies, any blocked OLIS data will not be shown.
Note: Unblocking OLIS data will result in OLIS data being visible by all other end users (e.
your organization.
Override Consent and View Patient Record
Cancel

Figure 113: Consent Override, Option 3

Notes:

- This option will **not** override any blocked OLIS (Lab) PHI, only PHI from the CDR will be unblocked
- To subsequently unblock OLIS PHI, the patient must be put into context again (return to My Workspace and select patient again or search for the patient again) and consent override must be provided using option 1 or 2

Once the override has been completed, all data in the portlets will be refreshed and blocked PHI will display. The following message will display in any portlet, with the exception of the Lab and Pathology Results portlet, where blocked PHI is being viewed:

"Warning: You are viewing PHI that was blocked & may only use or disclose it as instructed by the patient/SDM."

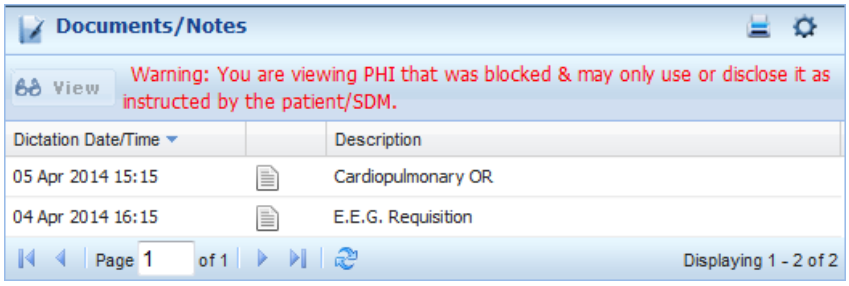

Documents/Notes
View
Warning: You are viewing PHI that was blocked & may only use or disclose it as instructed by the patient/SDM.
Dictation Date/Time
Description
05 Apr 2014 15:15
Cardiopulmonary OR
04 Apr 2014 16:15
E.E.G. Requisition
Page 1 of 1
Displaying 1 - 2 of 2

Figure 114: Viewing Blocked PHI

In the Lab and Pathology Results portlet, the following message will be displayed if blocked PHI is being viewed:

"Warning: One or more of the tests in the view may have been blocked by the patient as indicated within each OLIS report."

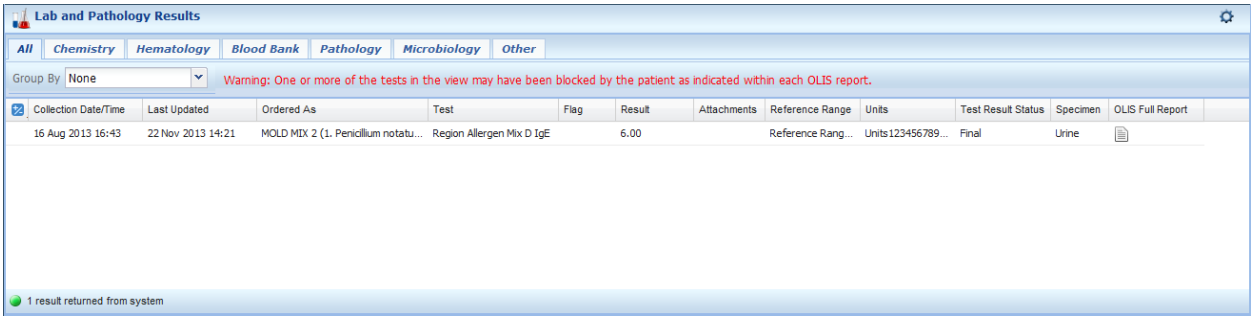


Figure 115: Viewing Blocked PHI - Lab and Pathology Results Portlet

Note: When providing a consent override for OLIS PHI, consent will be overridden for any user within your Organization for 4 hours. When providing a consent override for non-OLIS PHI, consent will be overridden until 11:59pm on the day on which the override occurs.

Note: Selecting 'Cancel' or closing the dialog is the equivalent to declining to override. The option to override will be displayed again in the portlet.

Note: All consent directive overrides are reviewed by the CPO of the Organization.

Patient Summary Views and Custom Views

Summary views are used to provide a quick overview of recent activity in a patient's record. Every portlet can be viewed on the Summary View page, Summary List View page or on the individual portlet page for that portlet. See General Navigation.

Users can also create their own custom views with any combination of portlets displayed on the view.

Working with Custom Views

To create a custom view

1. Expand the navigation bar, if necessary.
2. Select the edit icon at the top of the navigation bar.

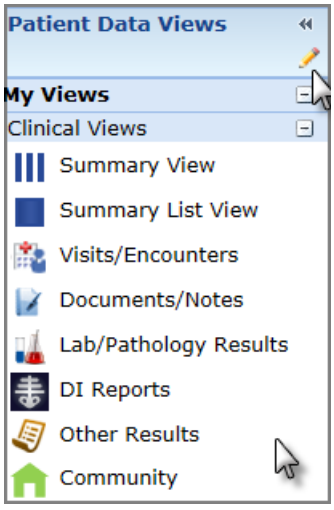


Figure 116: Edit Icon on the Left Navigation Bar

Note: If the edit icon is not available, click **My Views**.

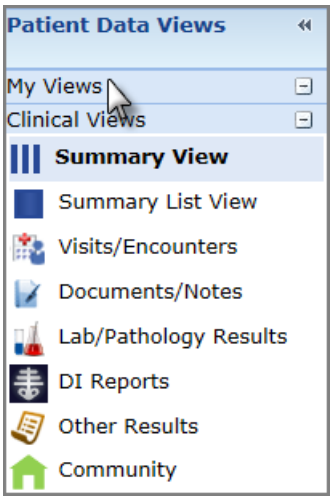


Figure 117: My Views

3. Click the **More** button, then click **Add New Page/View...**

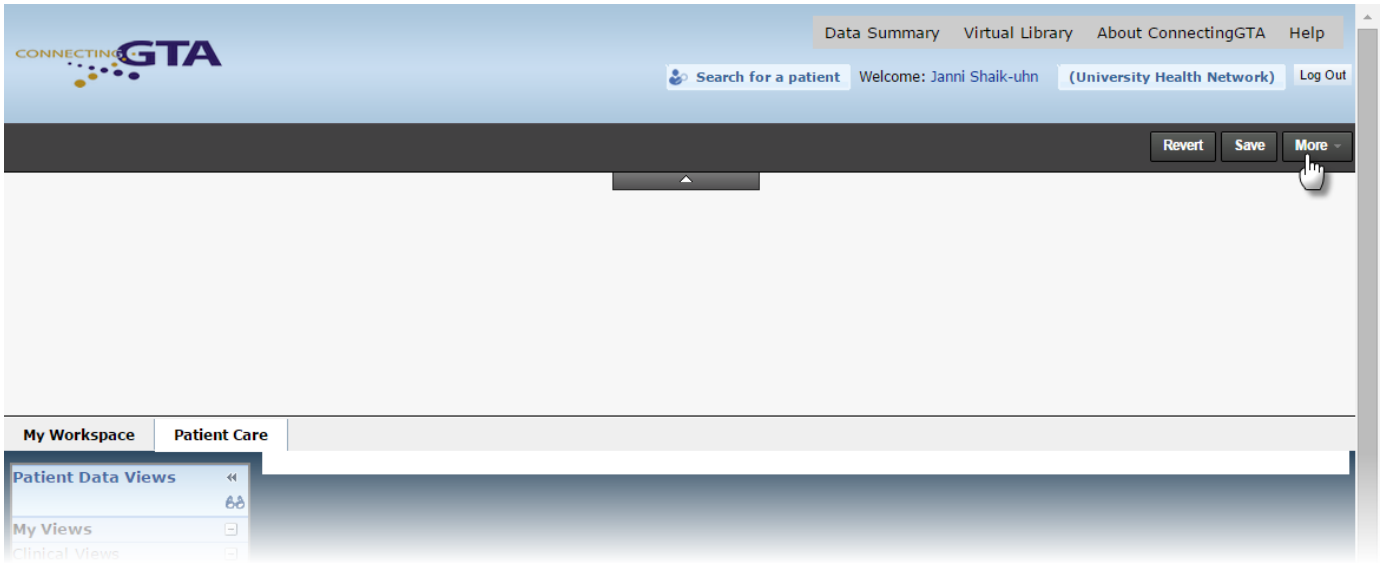


Figure 118: More Button

4. From the Create Page dialog box, in the **Page Name** box, type a name.

Note: No action is required on the 'Friendly URL Name' field, this will populate automatically.

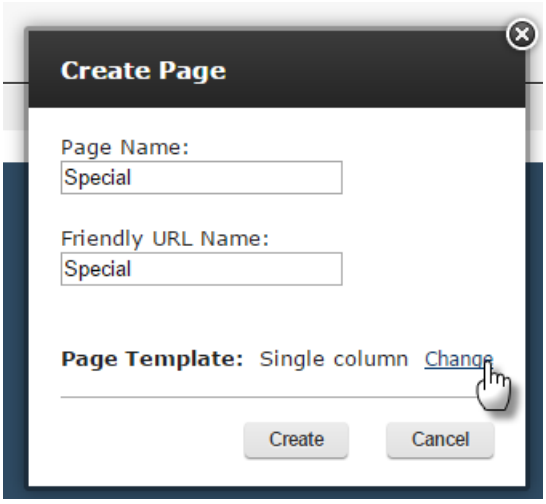


Figure 119: Create Page Dialog

5. Click the **Change** link.
6. From the Select a template dialog box, select either "Single column" or "Top column, three vertical columns", then click the **Select** button.

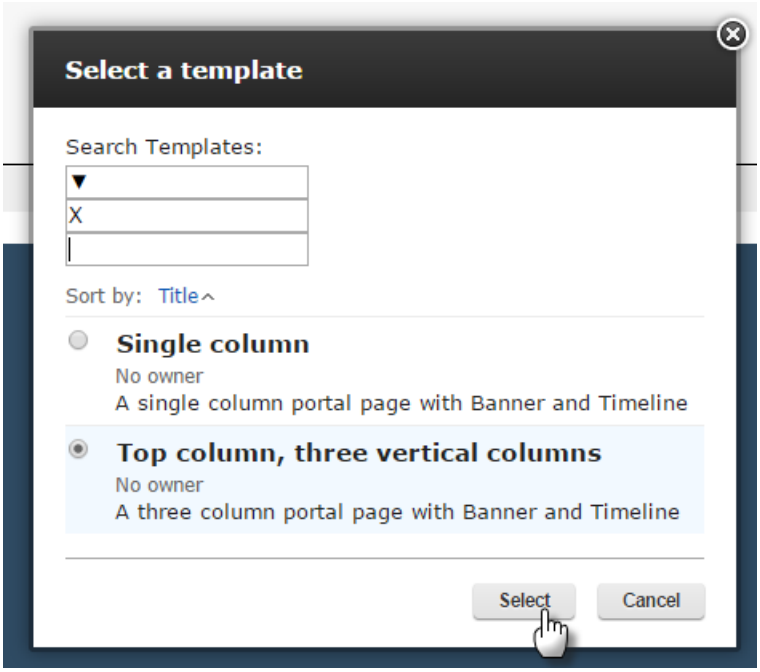


Figure 120: Select a Template Dialog

7. From the Create Page dialog box, click the **Create** button.

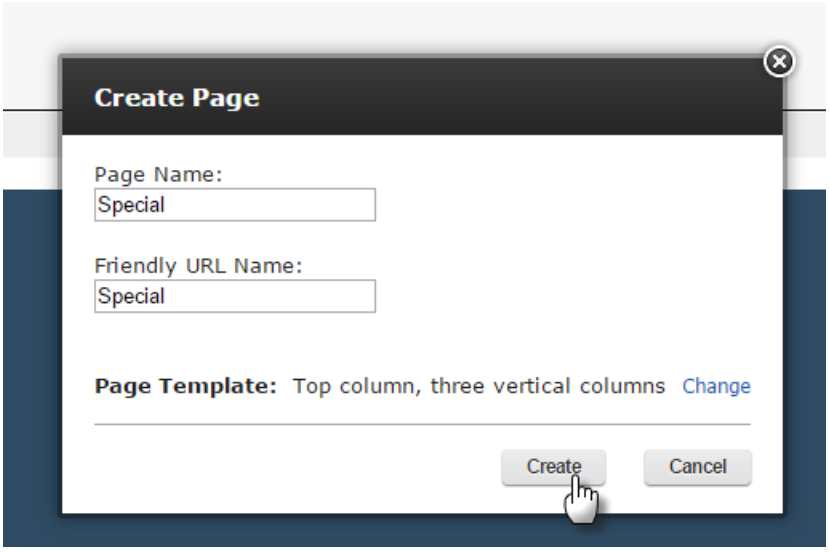


Figure 121: Create Page Dialog

8. Do one of the following to select the portlets to include in the custom view:

- Click the **+** icon for the porlet you wish to add.

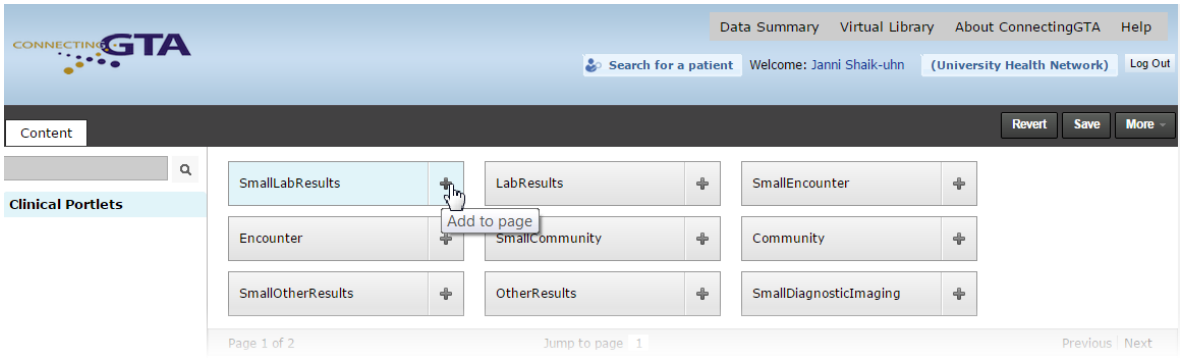


Figure 122: Add Portlet using the + Button

- Click the **name of the porlet** you wish to add. Then from the Details dialog box that appears, click the **Add to page** button.

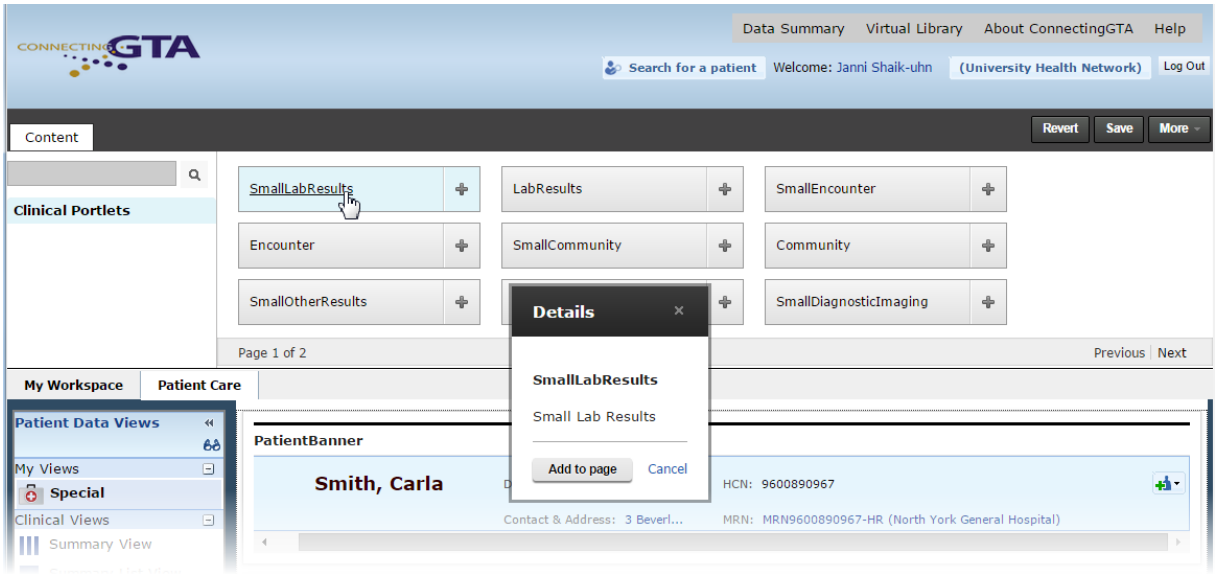


Figure 123: Add Portlet by Clicking on the Portlet Name

- **Drag and drop** the portlet you wish to add.

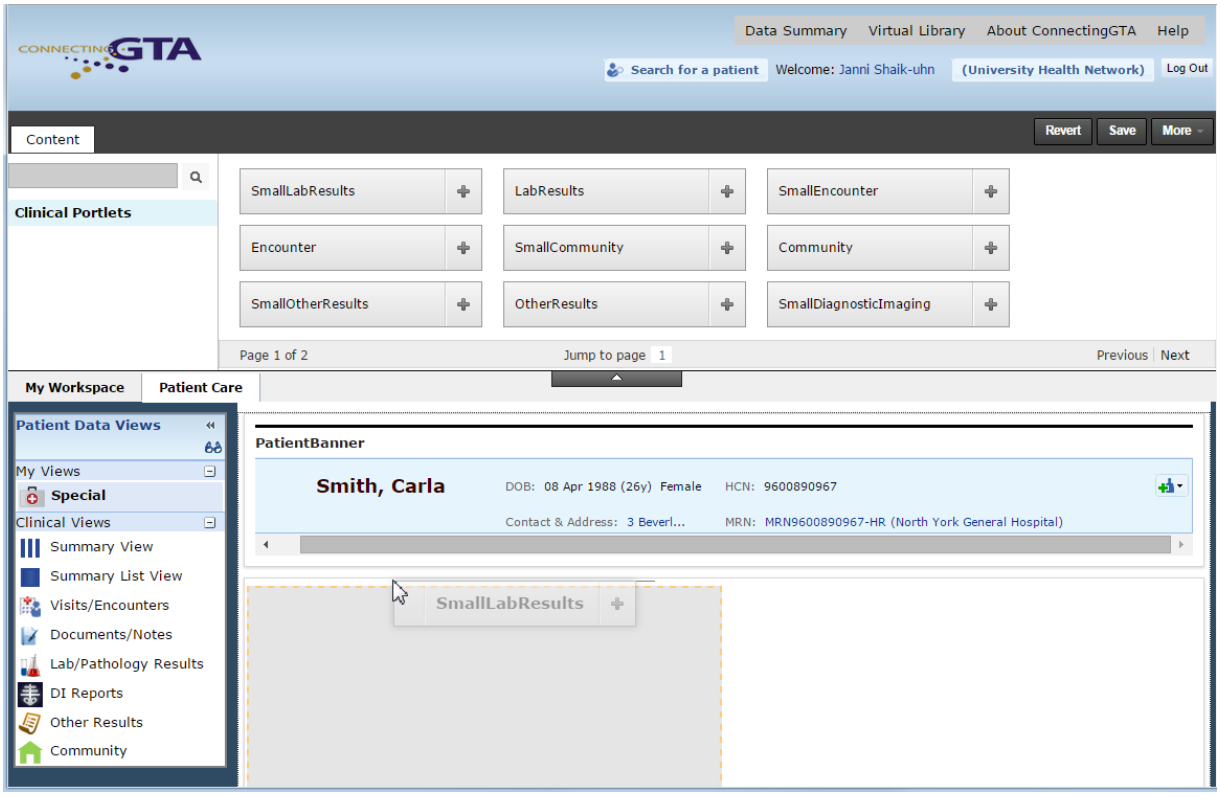


Figure 124: Add Portlet by Drag & Drop

In the three column layout, the portlets are added to the middle column directly below the Timeline. The user can then 'drag and drop' each portlet into the appropriate position.

In the one column layout, the portlets are added directly below the Timeline. The user can then 'drag and drop' each portlet into the appropriate position

Reminder: By default the Timeline and Patient Banner components are displayed as the first two components at the top of any view. These components cannot be removed and their position should not be modified.

9. To save the view, do one of the following:

- Click the **Save** button.

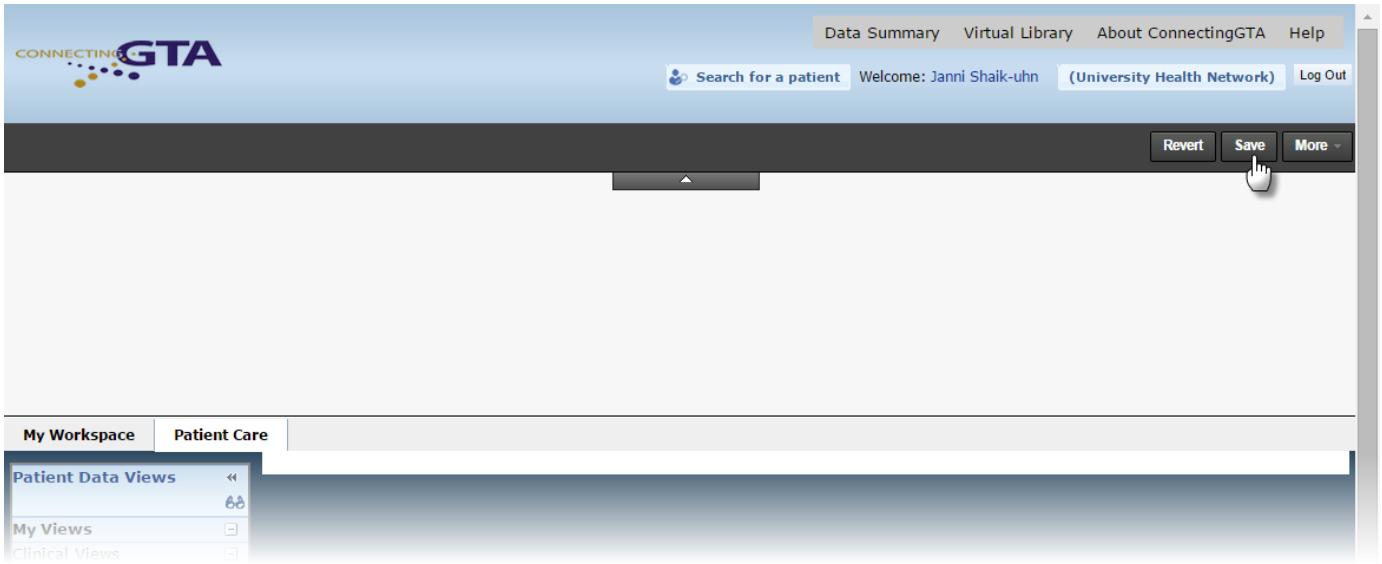


Figure 125: Save Button

- Click the **save** link within the view.

Figure 126: Save Hyperlink within the Portlet

10. To revert to the last saved version of the page, click the **revert** button.

Figure 127: Revert Button

11. Once completed with the page, click the view icon.

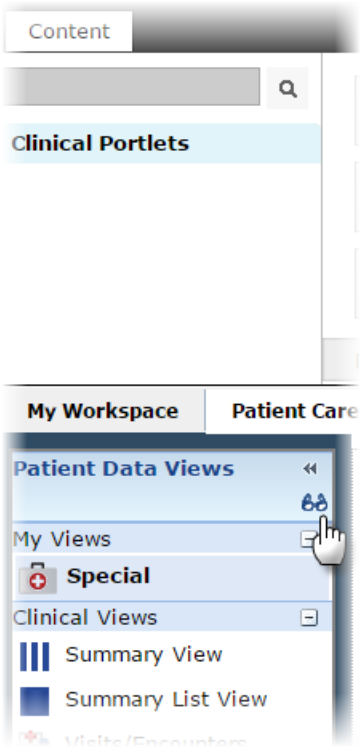


Figure 128: View Icon

Notice that the custom view that you have just created now appears in the navigation bar, whether it is expanded or collapsed.

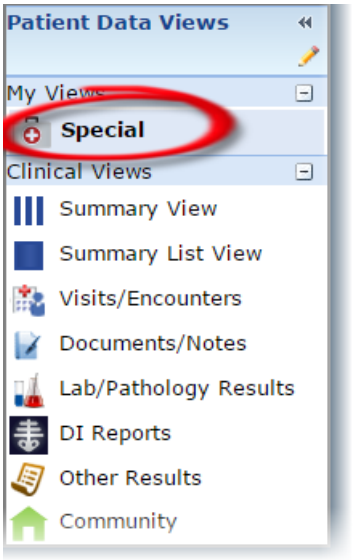


Figure 129: Left Navigation Bar with New View

To edit a custom view

1. Expand the navigation bar, if necessary.

2. Select the custom view you intend to edit.
3. Select the edit icon at the top of the navigation bar.

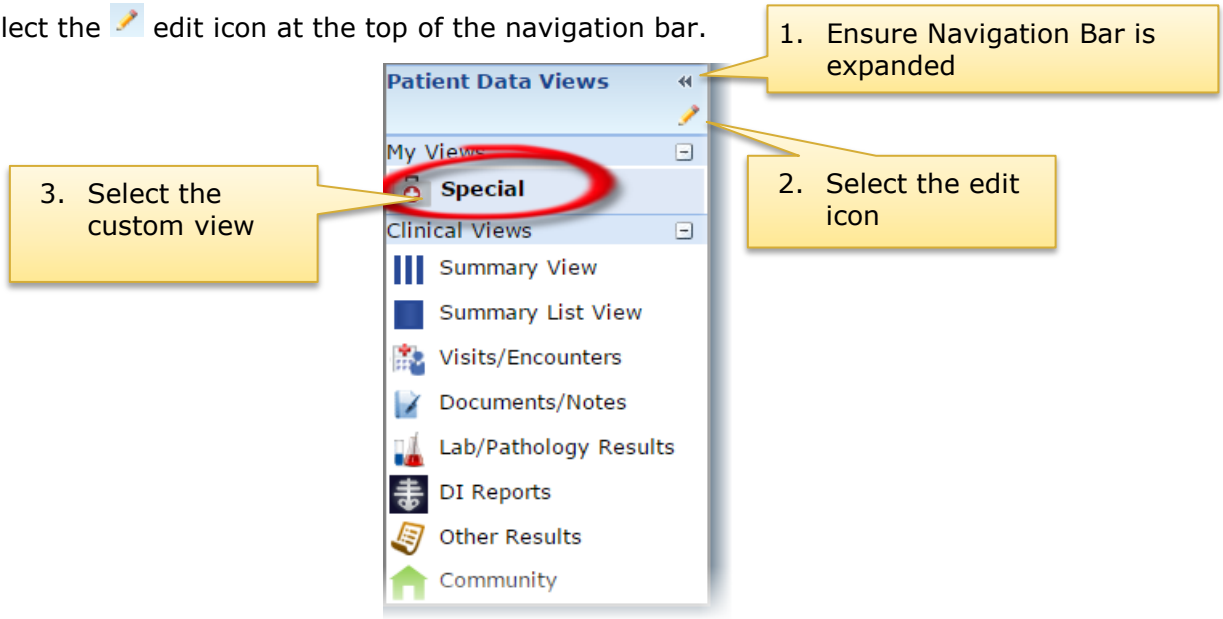


Figure 130: Left Navigation Bar with Custom View

4. Edit the custom view by adding, moving, or deleting portlets.

To move portlets around within the custom view, users can 'drag and drop' the portlet or use the right click menu. To access this menu, right click at the extreme right side of the portlet header. The menu will display with available options for moving the portlet.

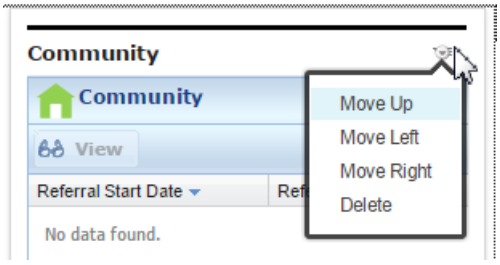


Figure 131: Right Click Menu

5. Click the **Save** button.
6. Click the view icon.

Note: To change the name or layout of the page, the users will need to create a new page/view and delete the one they no longer want.

To delete a custom view

1. Expand the navigation bar, if necessary.
2. Select the custom view you intend to delete.
3. Select the edit icon at the top of the navigation bar.

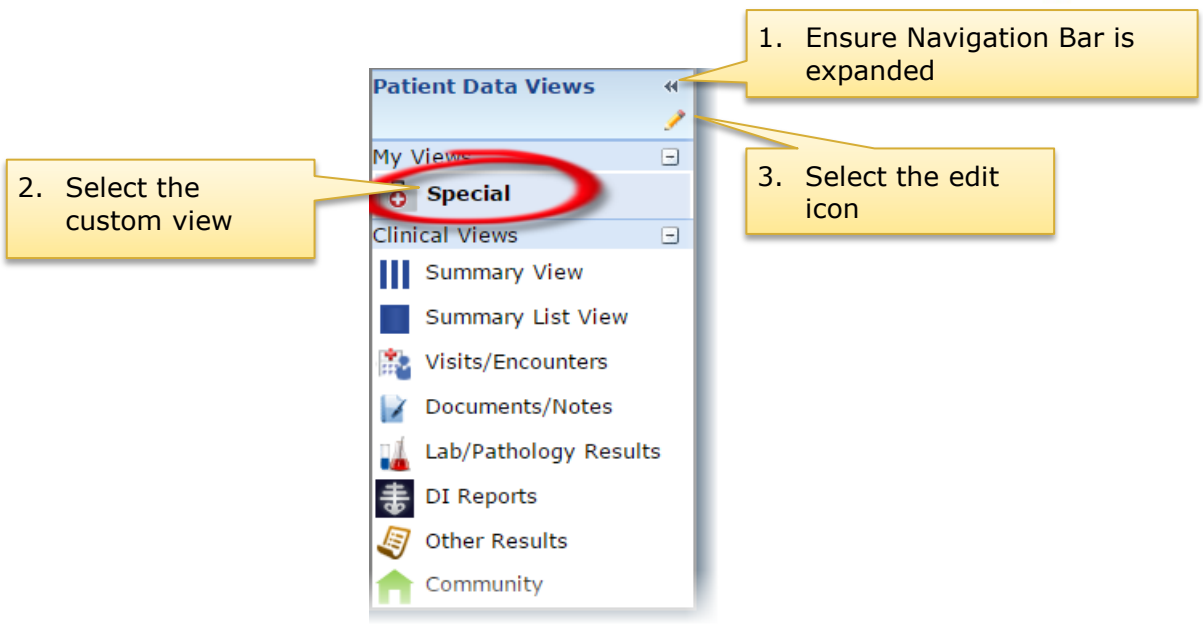
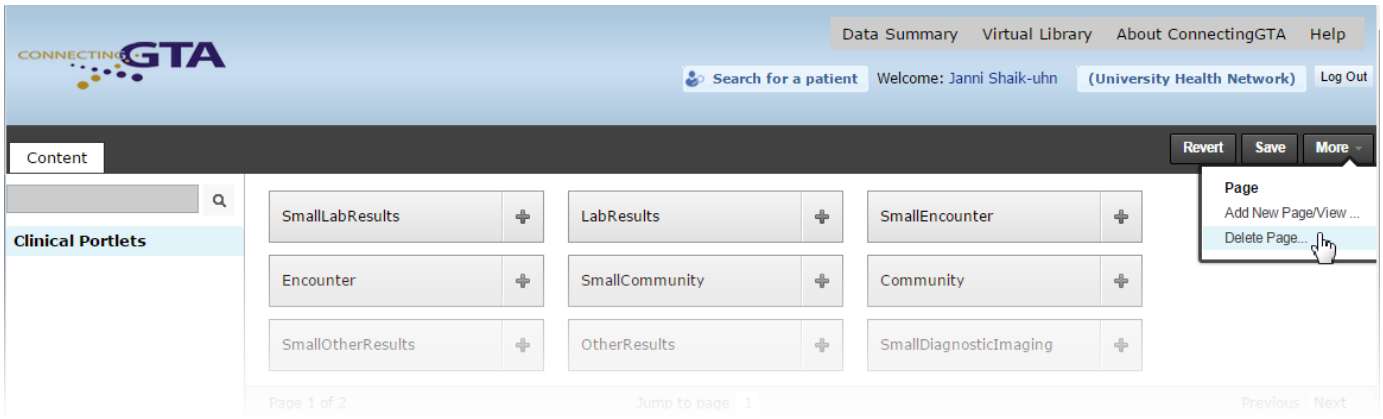


Figure 132: Left Navigation Bar with Custom View

4. Click the **More** button, then click **Delete Page...**



5. Click **OK** to confirm that you want to delete the page.
6. Click the view icon.

Summary View

When first accessing the Patient Care tab, the default view is the Summary View view. This is a consolidated view of all six portlets showing data 30 days back from today. Each portlet is in its condensed format, not showing all data columns.

Note: The view that appears at the top of the Left Navigation Bar (first view in the list) is the default view for the user. If the user does not have any My Views configured, the default view will always be the Summary View (defined below).

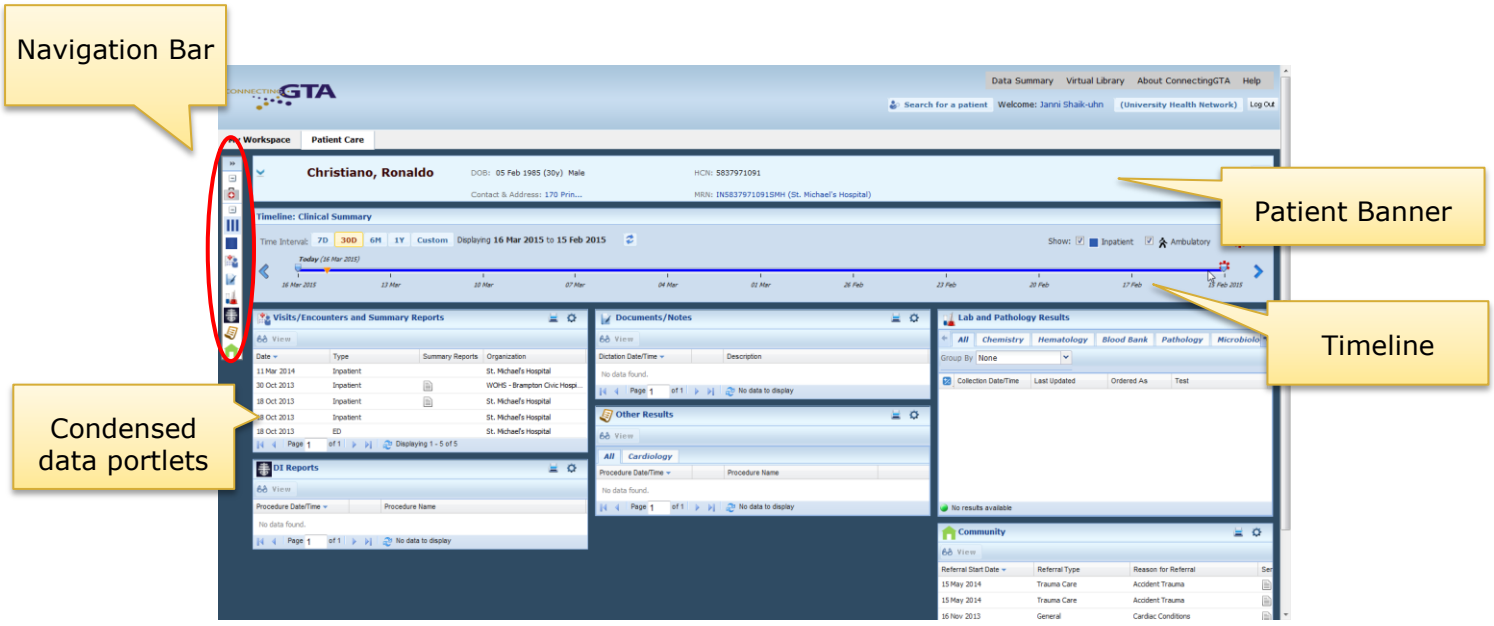


Figure 133: Summary View View

To see the full portlet, use the Navigation Bar to select the portlet of interest (Navigation Bar)

Summary List View

This view presents all six full-sized portlets in a single vertical view. All default columns will be displayed in this view since it is in full-sized portlet view.

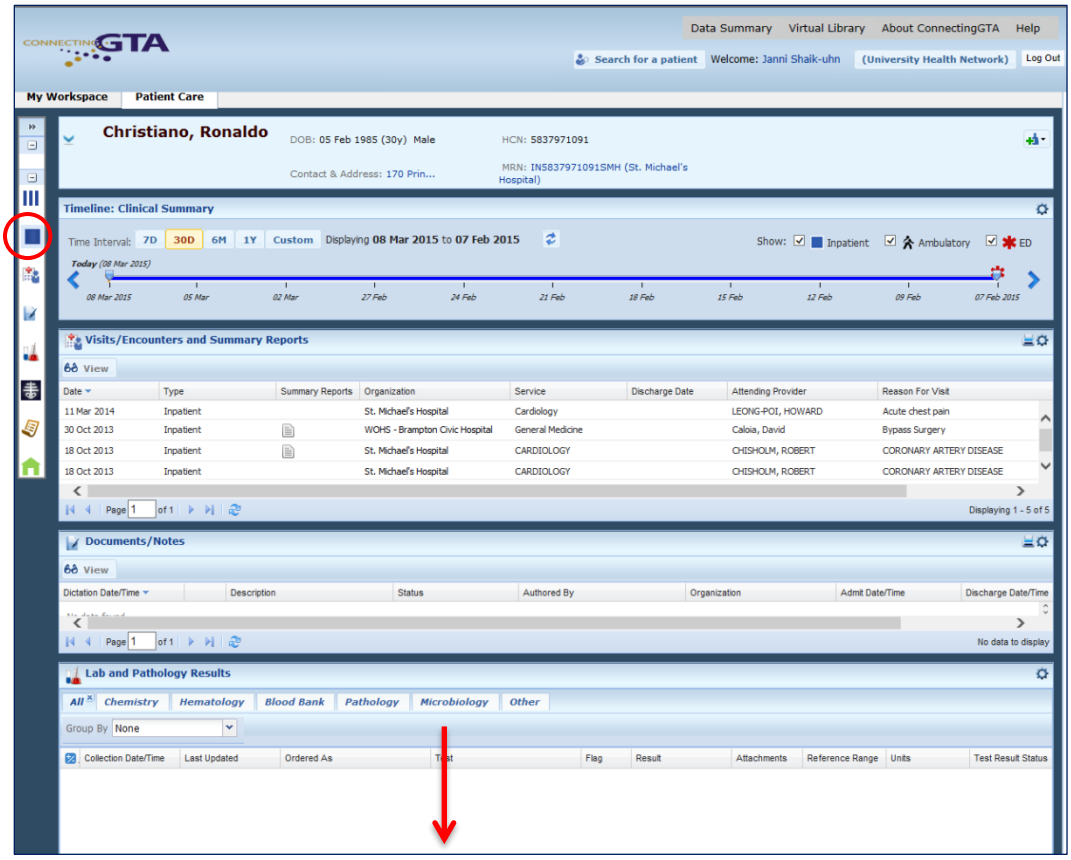


Figure 134: Summary List View View

Visits/Encounters and Summary Reports

The Visits/Encounters and Summary Reports portlet displays a list of all encounters (visits/episodes) for the selected patient from all data sources (locations) within the time period selected on the timeline. Any visit/encounter that **started**, **finished**, or is **ongoing** during the selected timeline range will display.

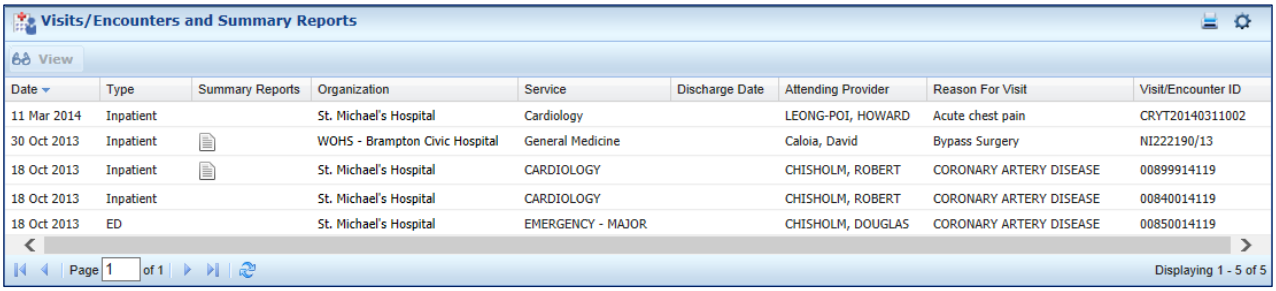

Visits/Encounters and Summary Reports
View
Date
Type
Summary Reports
Organization
Service
Discharge Date
Attending Provider
Reason For Visit
Visit/Encounter ID
11 Mar 2014 Inpatient St. Michael's Hospital Cardiology LEONG-POI, HOWARD Acute chest pain CRYT20140311002
30 Oct 2013 Inpatient WOHS - Brampton Civic Hospital General Medicine Caloia, David Bypass Surgery NI222190/13
18 Oct 2013 Inpatient St. Michael's Hospital CARDIOLOGY CHISHOLM, ROBERT CORONARY ARTERY DISEASE 00899914119
18 Oct 2013 Inpatient St. Michael's Hospital CARDIOLOGY CHISHOLM, ROBERT CORONARY ARTERY DISEASE 00840014119
18 Oct 2013 ED St. Michael's Hospital EMERGENCY - MAJOR CHISHOLM, DOUGLAS CORONARY ARTERY DISEASE 00850014119
Page 1 of 1
Displaying 1 - 5 of 5

Figure 135: Visits/Encounters and Summary Reports Portlet

The standard (default) columns as displayed above are:

Column	Description
Date	Visit date if an ambulatory visit. Encounter start date if inpatient, emergency department (ED) or recurring visits. **Default sort using this column*
Type	– Inpatient* – Ambulatory* – ED (Emergency Department)* – Pre-admit – Recurring Outpatient – Unknown / Other * An icon will display on the timeline for these visit types
Summary Reports	Attachment icon will display when documents are available for viewing. Click on the "View" icon with the row selected, double click on the row, or click directly on the attachment icon to open the Document Viewer with the document of interest displayed (Viewing Documents).
Organization	The facility or organization where the patient was actually seen. Click the link to see additional information.
Service	The service department or clinic where the visit/encounter took place (e.g., Cardiology, Fracture Clinic).
Discharge Date	Date of discharge for the visit/encounter. If an Inpatient or ED visit does not have a discharge date, it is considered to be ongoing. ***Note:*** Ambulatory visits will never have a discharge date.
Attending Provider	Attending Provider for the visit/encounter.

Reason for Visit	Reason for visit or the diagnosis for the visit.
Visit /Encounter ID	Visit or encounter number. ***Note:*** This is a system number that can be used for cross-referencing with the Documents/Notes portlet.

Table 6: Visits/Encounters and Summary Reports Data Elements

Summary Reports

Depending on the type of visit, certain documents associated to each visit can be viewed from this portlet using the Document Viewer (as listed in the table below). Any documents not available directly from the Visits/Encounters portlet will be available in the Documents/Notes portlet.

Visit Type	Document Type to Display
ED	Triage Note, ED Visit Report
Inpatient	Admission Assessment, Discharge Summary, Medication Reconciliation Report
Ambulatory	Display all report types associated to the visit (no filtering).
Pre-Admit	Display all report types associated to the visit (no filtering).
Recurring Outpatient	Display all report types associated to the visit (no filtering).
Unknown /Other	No reports are being pulled back. Portal will not display any reports for this visit type

Table 7: Types of Reports Displayed per Visit Type

If there are more than 20 documents, a message will be displayed.

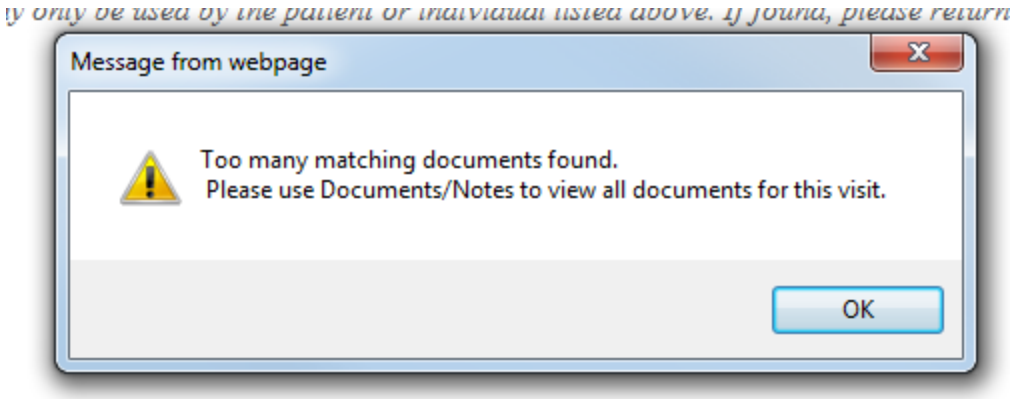

Message from webpage
Too many matching documents found.
Please use Documents/Notes to view all documents for this visit.
OK

Figure 136: Too many matching documents

Preferences

By default, the Visits/Encounters and Summary Reports portlet shows all available columns. Users can set preference for the portlet list using two methods.

A. Adjust preferences directly on the list

- Adjust the width of any column (Column Width).
- Hide any of the columns from the display (Hide or Show Columns).
- Sort the list by any column in ascending or descending order (Sorting)
- Filter the list by the date column (Filtering).

Note: Above preferences are not saved after navigating away from the portlet.

B. Personalize the list by clicking on the 'User Preferences' button .

- Change which columns are displayed (Modify Columns – Hide/Display)
- Change the order they are in (Modify Columns – Change Display Order)
- Select which column should be used as the default sort (Change Default Sort)
- Specify the number of data rows to display (Set Content Area Height)
- Reset to system defaults (Reset to System Default)

Note:

- If there are more rows than space available, use paging controls to see more rows or change the default number of rows per page (Paging).
- To print the list of encounters, click the print icon (Printing from List Views).

Documents/Notes

The Documents/Notes portlet includes all non-diagnostic notes and reports such as Consult Notes, Discharge Summaries, History and Physicals, etc.

Note: The largest file that can be sent to the portal is 7MB. Files larger than 7MB will be divided to smaller files by sites before sending to ConnectingGTA. Sites are suggested to name the files part 1 and part 2 to indicate the relationship of the files, however this may not always be the case.

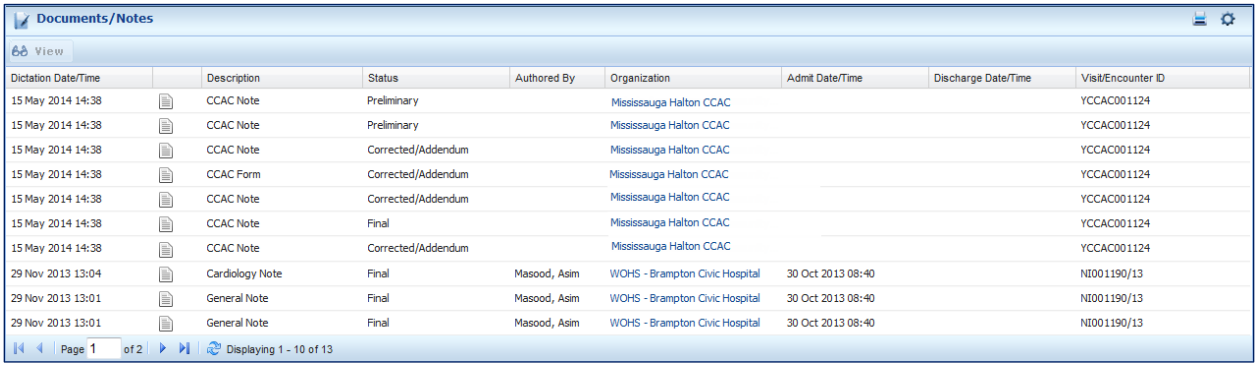

Documents/Notes
View
Dictation Date/Time
Description
Status
Authored By
Organization
Admit Date/Time
Discharge Date/Time
Visit/Encounter ID
15 May 2014 14:38 CCAC Note Preliminary Mississauga Halton CCAC YCCAC001124
15 May 2014 14:38 CCAC Note Preliminary Mississauga Halton CCAC YCCAC001124
15 May 2014 14:38 CCAC Note Corrected/Addendum Mississauga Halton CCAC YCCAC001124
15 May 2014 14:38 CCAC Form Corrected/Addendum Mississauga Halton CCAC YCCAC001124
15 May 2014 14:38 CCAC Note Corrected/Addendum Mississauga Halton CCAC YCCAC001124
15 May 2014 14:38 CCAC Note Final Mississauga Halton CCAC YCCAC001124
15 May 2014 14:38 CCAC Note Corrected/Addendum Mississauga Halton CCAC YCCAC001124
29 Nov 2013 13:04 Cardiology Note Final Masood, Asim WOHS - Brampton Civic Hospital 30 Oct 2013 08:40 NI001190/13
29 Nov 2013 13:01 General Note Final Masood, Asim WOHS - Brampton Civic Hospital 30 Oct 2013 08:40 NI001190/13
29 Nov 2013 13:01 General Note Final Masood, Asim WOHS - Brampton Civic Hospital 30 Oct 2013 08:40 NI001190/13
Page 1 of 2
Displaying 1 - 10 of 13

Figure 137: Documents/Notes Portlet

The standard (default) columns as displayed above are:

Column	Description
Dictation Date / Time	The dictation date and time of the document or note. *Default sort using this column
Attachments *(no label)*	Attachment icon will display when documents are available for viewing. Click on the "View" icon with the row selected, double click on the row, or click directly on the attachment icon to open the Document Viewer with the document of interest displayed (Viewing Documents).
Description	Description (title) of the document/note.
Status	Indicates the status of the document or note (e.g., preliminary, final, etc.).

	Only the most recent status of a document will be displayed in the portlet. For a document/note with a status of 'Withdrawn', row detail will display but no attachment will be available. If attachment is required, contact the originating Organization.
Authored By	The provider who dictated or documented the note or report.
Organization	The facility or organization where the document or note was created. Click the link to see additional information.
Admit Date / Time	The admission date for the encounter associated with the note or report.
Discharge Date / Time	The discharge date for the encounter associated with the note or report.
Encounter / Visit ID	The visit or encounter number that the note or report is associated with. ***Note:*** This is a system number that can be used for cross-referencing with the Visits/Encounters portlet.

Table 8: Documents/Notes Data Elements

Preferences

By default, the Documents/Notes portlet shows all available columns. Users can set preference for the portlet list using two methods.

A. Adjust preferences directly on the list

- Adjust the width of any column (Column Width).
- Hide any of the columns from the display (Hide or Show Columns).
- Sort the list by any column in ascending or descending order (Sorting)
- Filter the list by any column, with the exception of Attachments (Filtering).

Note: Above preferences are not saved after navigating away from the portlet.

B. Personalize the list by clicking on the 'User Preferences' button .

- Change which columns are displayed (Modify Columns – Hide/Display)
- Change the order they are in (Modify Columns – Change Display Order)

- Select which column should be used as the default sort (Change Default Sort)
- Specify the number of data rows to display (Set Content Area Height)
- Reset to system defaults (Reset to System Default)

Note:

- If there are more rows than space available, use paging controls to see more rows or change the default number of rows per page (Paging).
- To print the list of Documents/Notes, click the print icon (Printing from List Views).

DI Reports

The Diagnostic Imaging (DI) Reports portlet includes reports for all modalities found in the Diagnostic Imaging department. The categories are based on the regional Diagnostic Imaging categorization of procedures.

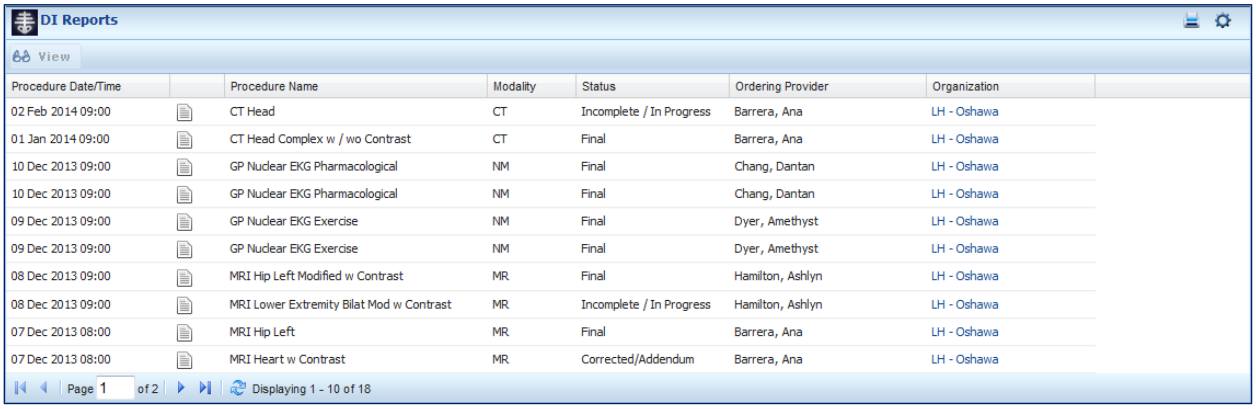

DI Reports
View
Procedure Date/Time
Procedure Name
Modality
Status
Ordering Provider
Organization
02 Feb 2014 09:00 CT Head CT Incomplete / In Progress Barrera, Ana LH - Oshawa
01 Jan 2014 09:00 CT Head Complex w / wo Contrast CT Final Barrera, Ana LH - Oshawa
10 Dec 2013 09:00 GP Nuclear EKG Pharmacological NM Final Chang, Dantan LH - Oshawa
10 Dec 2013 09:00 GP Nuclear EKG Pharmacological NM Final Chang, Dantan LH - Oshawa
09 Dec 2013 09:00 GP Nuclear EKG Exercise NM Final Dyer, Amethyst LH - Oshawa
09 Dec 2013 09:00 GP Nuclear EKG Exercise NM Final Dyer, Amethyst LH - Oshawa
08 Dec 2013 09:00 MRI Hip Left Modified w Contrast MR Final Hamilton, Ashlyn LH - Oshawa
08 Dec 2013 09:00 MRI Lower Extremity Bilat Mod w Contrast MR Incomplete / In Progress Hamilton, Ashlyn LH - Oshawa
07 Dec 2013 08:00 MRI Hip Left MR Final Barrera, Ana LH - Oshawa
07 Dec 2013 08:00 MRI Heart w Contrast MR Corrected/Addendum Barrera, Ana LH - Oshawa
Page 1 of 2
Displaying 1 - 10 of 18

Figure 138: DI Reports Portlet

The standard (default) list of columns as displayed above:

Column	Description
Procedure Date / Time	The date and time the procedure took place (e.g. the time the patient had their x-ray). *Default sort using this column
Attachments *(no label)*	Attachment icon will display when documents are available for viewing. Click on the "View" icon with the row selected, double click on the

	row, or click directly on the attachment icon to open the Document Viewer with the document of interest displayed (Viewing Documents).
Procedure Name	Name of the procedure that was performed.
Modality	– General Radiography – CT Scan (Computed Tomography) – MRI (Magnetic Resonance Imaging) – NM (Nuclear Medicine) – Ultrasound – Mammography – Special Procedures Report – Other
Status	Indicates the status of the document or note (e.g., preliminary, final, etc.). Only the most recent status of a document will be displayed in the portlet. For a report with a status of 'Withdrawn', row detail will display but no attachment will be available. If attachment is required, contact the originating Organization.
Ordering Provider	Provider who ordered the test, not the person who dictated the report.
Organization	The facility or organization where the document or note was created. Click the link to see additional information.

Table 9: DI Reports Data Elements

Preferences

By default, the DI Reports portlet shows all available columns. Users can set preference for the portlet list using two methods.

A. Adjust preferences directly on the list

- Adjust the width of any column (Column Width).
- Hide any of the columns from the display (Hide or Show Columns).
- Sort the list by any column in ascending or descending order (Sorting)

- Filter the list by any column, with the exception of the Attachments column (Filtering).

Note: Above preferences are not saved after navigating away from the portlet.

B. Personalize the list by clicking on the 'User Preferences' button .

- Change which columns are displayed (Modify Columns – Hide/Display)
- Change the order they are in (Modify Columns – Change Display Order)
- Select which column should be used as the default sort (Change Default Sort)
- Specify the number of data rows to display (Set Content Area Height)
- Reset to system defaults (Reset to System Default)

Note:

- If there are more rows than space available, use paging controls to see more rows or change the default number of rows per page (Paging).
- To print the list of DI Reports, click the print icon (Printing from List Views).

Other Results

The Other Results portlet includes all results that are not in the Lab Results, Diagnostic Imaging Reports, or Documents/ Notes portlets. The Other Results portlet will hold any procedure categorized by program and in some instances discipline, depending on how the site has mapped the document.

This portlet has 2 tabs:

- **'All'** tab - displays all reports/results
- **'Cardiology'** tab – will display any results categorized as 'Cardiology'

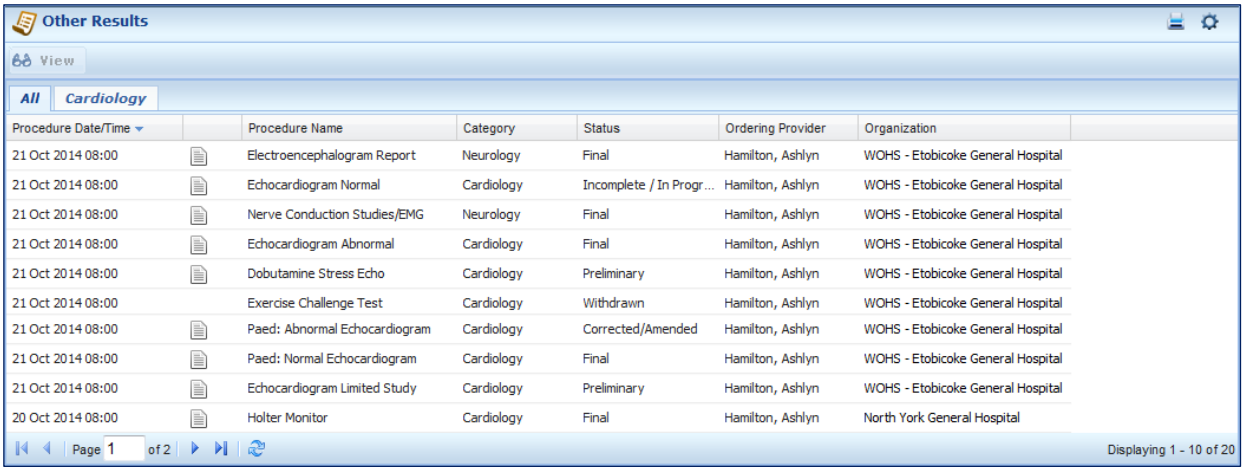

Other Results
View
All
Cardiology
Procedure Date/Time
Procedure Name
Category
Status
Ordering Provider
Organization
21 Oct 2014 08:00 Electroencephalogram Report Neurology Final Hamilton, Ashlyn WOHS - Etobicoke General Hospital
21 Oct 2014 08:00 Echocardiogram Normal Cardiology Incomplete / In Progr... Hamilton, Ashlyn WOHS - Etobicoke General Hospital
21 Oct 2014 08:00 Nerve Conduction Studies/EMG Neurology Final Hamilton, Ashlyn WOHS - Etobicoke General Hospital
21 Oct 2014 08:00 Echocardiogram Abnormal Cardiology Final Hamilton, Ashlyn WOHS - Etobicoke General Hospital
21 Oct 2014 08:00 Dobutamine Stress Echo Cardiology Preliminary Hamilton, Ashlyn WOHS - Etobicoke General Hospital
21 Oct 2014 08:00 Exercise Challenge Test Cardiology Withdrawn Hamilton, Ashlyn WOHS - Etobicoke General Hospital
21 Oct 2014 08:00 Paed: Abnormal Echocardiogram Cardiology Corrected/Amended Hamilton, Ashlyn WOHS - Etobicoke General Hospital
21 Oct 2014 08:00 Paed: Normal Echocardiogram Cardiology Final Hamilton, Ashlyn WOHS - Etobicoke General Hospital
21 Oct 2014 08:00 Echocardiogram Limited Study Cardiology Preliminary Hamilton, Ashlyn WOHS - Etobicoke General Hospital
20 Oct 2014 08:00 Holter Monitor Cardiology Final Hamilton, Ashlyn North York General Hospital
Page 1 of 2
Displaying 1 - 10 of 20

Figure 139: Other Results Portlet

The standard (default) columns as displayed above are:

Column	Description
Procedure Date / Time	The date and time the procedure took place (e.g. the time the patient had their EKG). *Default sort using this column
Attachments *(no label)*	Attachment icon will display when documents are available for viewing. Click on the "View" icon with the row selected, double click on the row, or click directly on the attachment icon to open the Document Viewer with the document of interest displayed (Viewing Documents).
Procedure Name	Name of the procedure that was performed.
Category	Procedure category (e.g. "Cardiology", "Neurophysiology", etc.)
Status	Indicates the status of the document or note (e.g., preliminary, final, etc.). Only the most recent status of a document will be displayed in the portlet. For a report with a status of 'Withdrawn', row detail will display but no attachment will be available. If attachment is required, contact the originating Organization.
Ordering Provider	Provider who ordered the test, not the person who dictated the report.
Organization	The facility or organization where the document or note was created. Click the link to see additional information.

Table 10: Other Results Data Elements

Preferences

By default, the Other Results portlet shows all available columns. Users can set preference for the portlet list using two methods.

C. Adjust preferences directly on the list

- Adjust the width of any column (Column Width).
- Hide any of the columns from the display (Hide or Show Columns).

- Sort the list by any column in ascending or descending order (Sorting)
- Filter the list by any column, with the exception of the Attachments column (Filtering).

Note: Above preferences are not saved after navigating away from the portlet.

D. Personalize the list by clicking on the 'User Preferences' button .

- Change which columns are displayed (Modify Columns – Hide/Display)
- Change the order they are in (Modify Columns – Change Display Order)
- Select which column should be used as the default sort (Change Default Sort)
- Specify the number of data rows to display (Set Content Area Height)
- Reset to system defaults (Reset to System Default)

Note:

- If there are more rows than space available, use paging controls to see more rows or change the default number of rows per page (Paging).
- To print the list of Other Results, click the print icon (Printing from List Views).

Lab and Pathology Results Portlet

Introduction to OLIS

Ontario Laboratories Information Systems (OLIS) is a provincial system that allows laboratory information on patients from Ontario to be stored and retrieved electronically between practitioners and laboratory service providers. Both private and acute institutions have been submitting data to OLIS since January 2006 and this data continues to grow as new laboratories come on board. The portal's Lab and Pathology Reports portlet provides a view-only access to data currently available in OLIS. This portlet is geared towards aiding clinical decision making and is meant to be used in combination with the clinican's existing access to their organization's Health Information Systems. The portlet is designed to present data as it is submitted to OLIS by the reporting laboratories without alteration.

Important keywords:

- **Order and Report:** In OLIS, a laboratory order and laboratory report differ only in whether the results have been reported for the ordered tests, so the terms order and report are often used interchangeably.
- **Order:** An order identifies a patient, an ordering practitioner, and a list of CC'd practitioners. The order's main purpose is to group one or more test requests ordered by the practitioner together.
- **Report:** A report is a structured view of the results for an order. The report has test request reported by an authorized Healthcare Facility.
- **Test Request**: In OLIS, the tests ordered by the practitioner are grouped into Test Requests (e.g. a Sodium test is sometimes grouped as part of a test request called Electrolytes).

- **OLIS Matching Points:** The Ontario Health Card Number (HCN) is the primary patient identifier the ConnectingGTA solution is using to match patient results stored in OLIS. This may occasionally result in missing data from the portal as smaller labs may report results using their own local identifiers (instead of an HCN) or patient's may only have federal health identifications (e.g. military personnel).

The Lab and Pathology Results portlet displays lab results returned from the Ontario Laboratories Information System (OLIS) in 5 views.

1. Condensed Portlet view - Summary View View
    a. Quick view of what results are available
2. Individual Portlet Page - List View and Detail View
    a. A more detailed view of what results are available with additional details available upon clicking each result. Not all details are displayed to enhance usability.
3. Full Report View
    a. The entire order shown as the reporting lab intended the lab to be viewed. All result for the order displayed with all the details available.
4. Attachment View
    a. All the attachments for a particular order are displayed at a glance.
5. Flowsheet View
    a. ***Note:*** not available in this release – expected for full go live
    b. All related results are grouped and displayed in a sequential reverse chronological manner displaying the test's trend in a tabular fashion.

Information from acute, community, private labs and public health are displayed in the portal.

Currently the portlet filters the returned OLIS lab results into 8 tabs based on laboratory modalities or functionality:

- All – *consolidated list of all available results*
- Hematology
- Chemistry
- Blood Bank
- Pathology
- Microbiology
- Other – *includes Immunology, Serology, Allergen and Clinical results*
- Flowsheet – aggregates results from every tab (with the exception of Microbiology and Pathology) into a list view

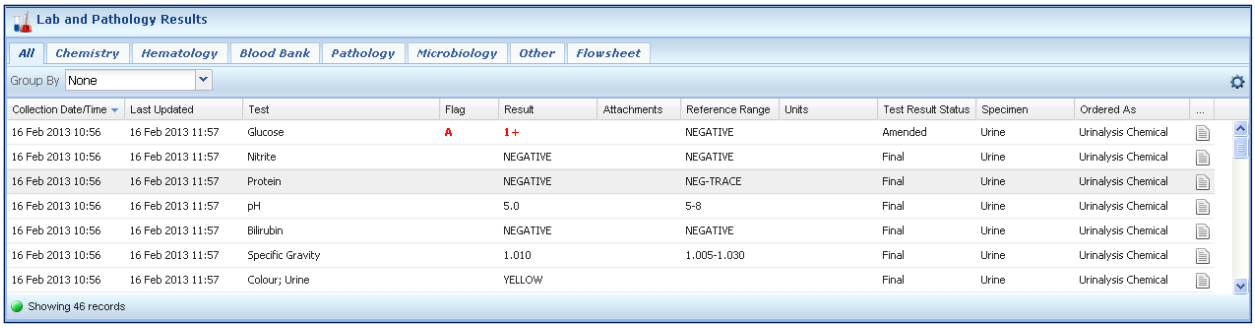

Lab and Pathology Results
All
Chemistry
Hematology
Blood Bank
Pathology
Microbiology
Other
Flowsheet
Group By None
Collection Date/Time
Last Updated
Test
Flag
Result
Attachments
Reference Range
Units
Test Result Status
Specimen
Ordered As
16 Feb 2013 10:56 16 Feb 2013 11:57 Glucose A 1+ NEGATIVE Amended Urine Urinalysis Chemical
16 Feb 2013 10:56 16 Feb 2013 11:57 Nitrite NEGATIVE NEGATIVE Final Urine Urinalysis Chemical
16 Feb 2013 10:56 16 Feb 2013 11:57 Protein NEGATIVE NEG-TRACE Final Urine Urinalysis Chemical
16 Feb 2013 10:56 16 Feb 2013 11:57 pH 5.0 5-8 Final Urine Urinalysis Chemical
16 Feb 2013 10:56 16 Feb 2013 11:57 Bilirubin NEGATIVE NEGATIVE Final Urine Urinalysis Chemical
16 Feb 2013 10:56 16 Feb 2013 11:57 Specific Gravity 1.010 1.005-1.030 Final Urine Urinalysis Chemical
16 Feb 2013 10:56 16 Feb 2013 11:57 Colour; Urine YELLOW Final Urine Urinalysis Chemical
Showing 46 records

Figure 140: Lab and Pathology Results Portlet

The look and feel of the Lab and Pathology portlet is consistent with the other portlets in ConnectingGTA. However, close attention is required when using the following functionalities:

- Filtering
- Sorting
- Printing
- Consent Override
- Status
- List View and Detail List View
- Hovering over full text result and links
- Portal Timeline

Condensed Portlet View – Summary View Page

Relevant patient information can be viewed at a glance in the condensed portlet view of the Lab and Pathology Results portlet. All Lab and Pathology results with a Specimen Collection Date/Time that falls within the selected timeline interval will be available in the portlet. In order to support an 'at a glance' view, only the following key fields are displayed in this view:

- Collection date and time
- Last updated time
- Ordered As
- Test (test result name)
- Flag

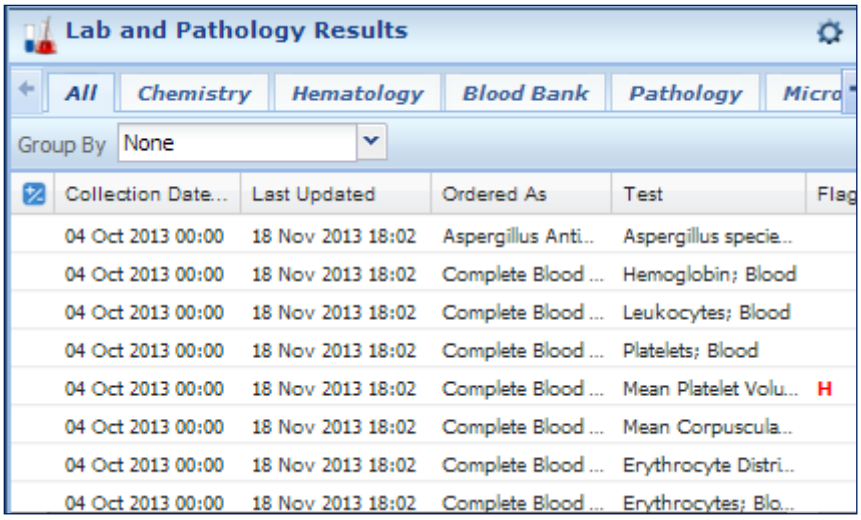


Figure 141: Lab and Pathology Reports Portlet, Condensed Portlet View

Users can navigate from this page to any of the other pages using the Navigation Bar.

Individual Portlet Page - List View and Detail View

Similar to the Condensed Portlet view, this view shows the data based on the selected Timeline interval. In this view, users can view data in both the List View and Details View.

While still providing an 'at a glance' view of the results, this view provides additional details necessary to facilitate making clinical decisions. This includes information such as result value, reference range, status, specimen, nature of abnormality, reporting organization, etc. Due to the large amount of details available it is broken into 3 groups of data:

1. The result value and attributes important to interpreting the result
2. Additional attributes about the result (comments, nature of abnormality, etc)
3. Order level attributes with relation to the result (reporting organization, test request status, etc)

The first group is displayed in the list view. The last two are displayed in the details view that is displayed upon clicking on the result row.

List View

The list view shares the same first 5 columns of the Condensed Portlet view and provides additional columns that are important for interpreting the results appropriately. When first accessing this view, the list view occupies the entire portlet module and is defaulted to the "All" tab. All lab results with a Collection Date/Time that falls within the selected Timeline interval will be displayed. Results are sorted by Collection Date/Time and the OLIS sort keys.

Note: If the result has been updated, the most recent result will always be displayed.

To view the Details screen:

1. Click on the result of interest (any row in the list)
2. The Details screen appears below the list to provide additional information about the result that was clicked.

Note: Once the details screen has been opened, the portal must be refreshed to close it again.

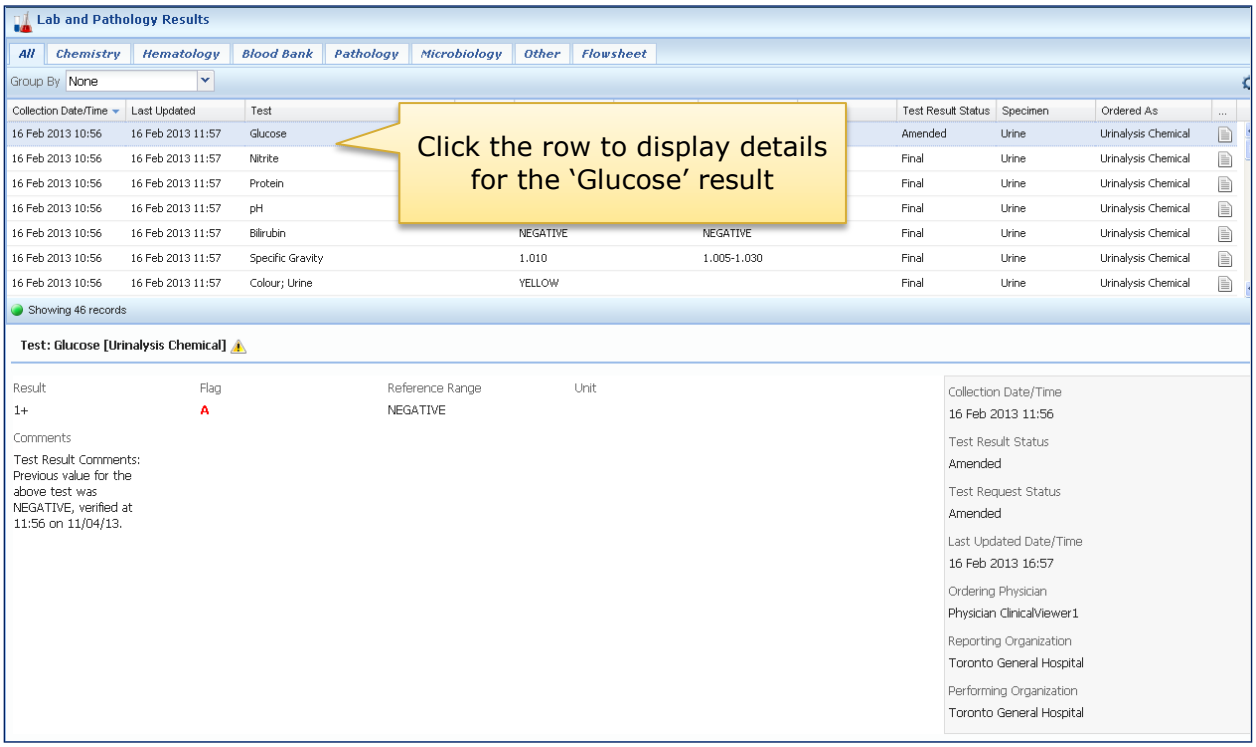


Figure 142: Individual Portlet Page, All Tab

Note that each tab has a default configuration of visible columns that varies based the appropriateness of displaying that field for that tab/modality. For example, the Pathology tab will not display a reference range or units by default as pathology results are generally available as a report and not a standard discrete or numerical result. Users can add additional columns to the view for each modality but cannot remove default columns. The columns available for display in any of the tabs are listed in the table below.

Column	Description
Collection Date/Time	Date and time of collection. This column is mandatory for all modalities. **Default sort using this column*

Last Updated	Date and time the result was last updated. This column is mandatory for all modalities.
Ordered As	Test Request name or Panel name that is associated with the test result. This column is mandatory for all modalities.
Test	Test result name. This column is mandatory for all modalities.
Flag	Flag provided with the result (Flags)
Result	Test result detail – numerical value or text. This column is mandatory for all modalities.
Attachments	An icon will display in this column if one or more attachments are associated with the result. Click on the "View" icon with the row selected or click directly on the attachment icon to open the Document Viewer with the document of interest displayed (Viewing Documents).
Reference Range	Reference range (normal range) for the test
Units	Unit of measure for the result value
Test Result Status	Status of the test result. This column is mandatory for all modalities.
Specimen	The source of the specimen
Source	Procedure source.
OLIS Full Report	An OLIS Full Report will be available for every lab result. Users can open the full OLIS report by clicking on the attachment icon in this column. Note that the report includes results for all Test Requests within the Order. This column is mandatory for all modalities.

Table 11: Lab and Pathology Results Data Elements, List View

Detail View

The Detail View is the box below the list view that displays additional detail about the patient lab results. The data displayed in the details screen is split into two sections: result level and order level.

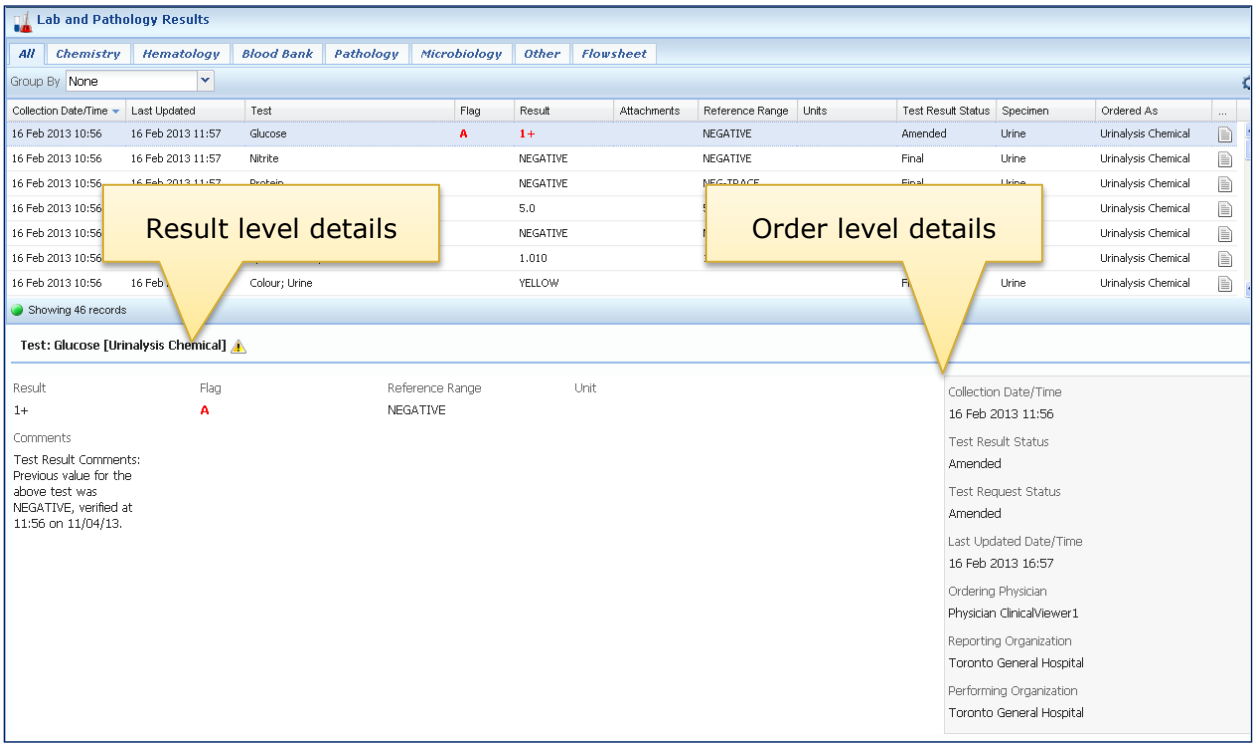


Figure 143: Lab Portlet, including Details View

Result level details are as follows:

Data Field	Description
Test Name	The test result name, test request name and a warning indicator if the result is abnormal.
Result	Test result detail – numerical value or text.
Flag	Flag provided with the result (Flags).

Reference Range	Reference Range (normal range) for the test and the nature of the abnormal result (if applicable).
Units	Unit of measure for the result value
Specimen	The source of the specimen.
Source	Procedure source
Reports/Images	Attachment link will display when attachments are available for the result (excluding the OLIS Full Report). Clicking on it opens the Document Viewer.
Test Result Comments	Comments associated with the test result, including ancillary comments.
Test Request Comments	Comments associated with the test request, including Collector's comments.
Order Comments	Comments associated with the order.

Table 12: Lab and Pathology Results Data Elements, Result Detail View

Order level details are as follows:

Data Field	Description
Test Result Status	Status of test result
Test Request Status	Status of test request
Collection Date/Time	Date and time of collection
Last Updated	Date and time the result was last updated

Ordering Physician	Physician who placed the order
Reporting Organization	Organization where the order was initiated
Performing Organization	Organization where the test was performed

Table 13: Lab and Pathology Results Data Elements, Order Detail View

Flags

When a result is abnormal, both the result value and flag value display in red and bold on the list view and detail view. The available OLIS flags are:

Flag	Description
	Indicates an abnormal result within a test request or grouping
L	Below low normal
H	Above high normal
LL	Below lower panic limits
HH	Above upper panic limits
A	Abnormal (applies to non-numeric results)
AA	Very abnormal (applies to non-numeric units, analogous to panic limits for numeric units)

Table 14: Lab and Pathology Results Data Elements, Flags

Note: When the value is abnormal, the accompanying nature of abnormality information is displayed beneath the reference range value in the Details view.

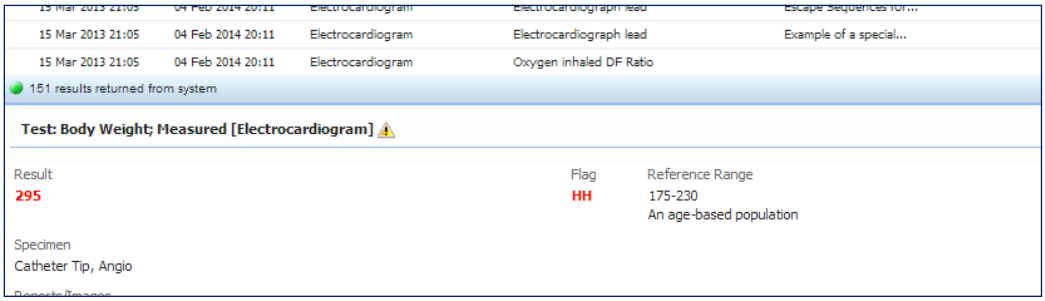

15 Mar 2013 21:05 04 Feb 2014 20:11 Electrocardiogram Electrocardiograph lead Example of a special...
15 Mar 2013 21:05 04 Feb 2014 20:11 Electrocardiogram Oxygen inhaled DF Ratio
151 results returned from system
Test: Body Weight; Measured [Electrocardiogram]
Result
295
Flag
HH
Reference Range
175-230
An age-based population
Specimen
Catheter Tip, Angio

Figure 144: Nature of Abnormality

Text Truncation

Result values in this portlet are truncated after 16 characters and are followed by an ellipse symbol ("…"). An example of truncation would appear as follows "positive but tre…"

Note: Hovering over the truncated text value in the Lab and Pathology Results portlet does not show the full text of the result. To view the full text, click on the link in the Detail View.

1. Click on the result with the truncated value to show the appropriate Details View.
2. Click on the result value that is hyperlinked within the Details View.

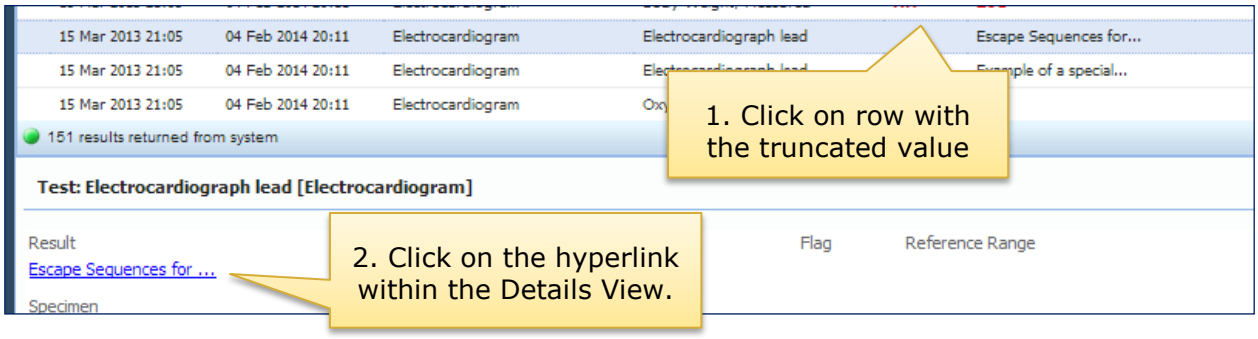

15 Mar 2013 21:05 04 Feb 2014 20:11 Electrocardiogram Electrocardiograph lead Escape Sequences for...
15 Mar 2013 21:05 04 Feb 2014 20:11 Electrocardiogram Example of a special...
15 Mar 2013 21:05 04 Feb 2014 20:11 Electrocardiogram
151 results returned from system
1. Click on row with the truncated value
Test: Electrocardiograph lead [Electrocardiogram]
Result
Escape Sequences for ...
Flag
Reference Range
Specimen
2. Click on the hyperlink within the Details View.

Figure 145: Lab and Pathology Results Portlet with Truncated Result

3. Full text of the truncated result will display in a pop up box.

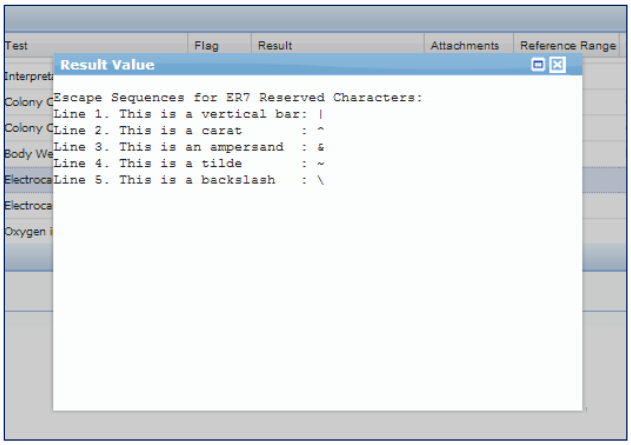

Test
Flag
Result
Attachments
Reference Range
Result Value
Escape Sequences for ER7 Reserved Characters:
Line 1. This is a vertical bar: |
Line 2. This is a carat : ^
Line 3. This is an ampersand : &
Line 4. This is a tilde : ~
Line 5. This is a backslash : \

Figure 146: Full Truncated Result View

Microbiology

When possible, microbiology data available in discrete values will be displayed in the List View. However, there are cases when this is not possible, including data related to sensitivities. In such cases, the user should access the OLIS Full Report directly (OLIS Full Report) to see the appropriate detail.

1. For the appropriate row, click the attachment icon within the OLIS Full Report column.

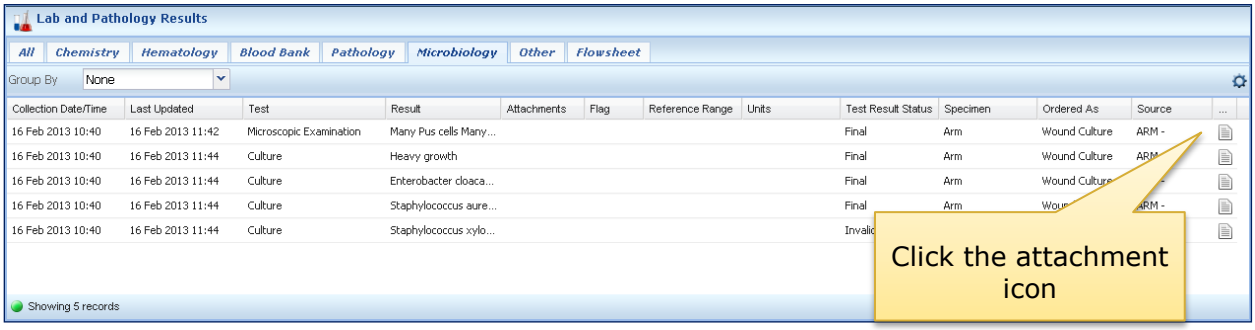


Figure 147: Microbiology Tab

Pathology

Pathology data is received in a report format and is not easily separated into detailed data without losing context. Due to this, the List View does not show the full set of data available. To facilitate the user's workflow, high level information such as site of origin (body part) and the type of test performed (e.g., surgical pathology) is displayed in the List View. To view the pathology test results in the proper format, users should open the OLIS Full Report.

1. For the appropriate row, click the attachment icon within the OLIS Full Report column.

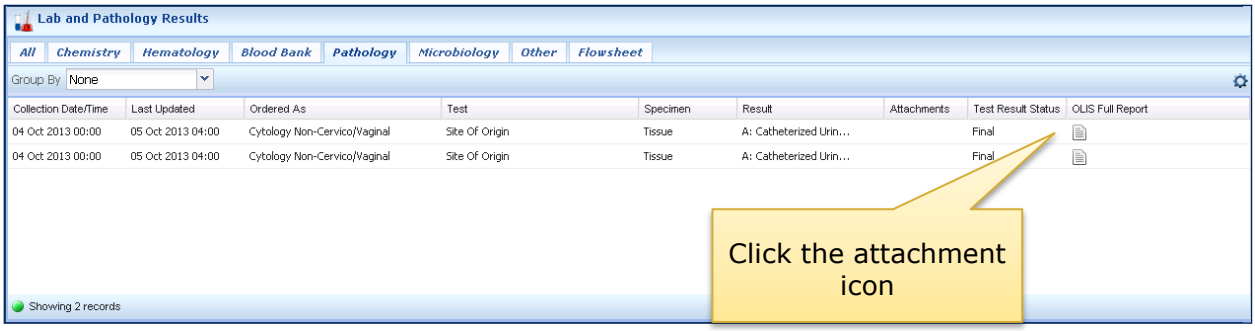


Figure 148: Pathology Tab

Flowsheet View

This functionality is not available for the R3A Release.

OLIS Full Report View

To view the complete detail of any lab order:

1. Click the attachment icon in the OLIS Full Report column within the appropriate result row of the List View.

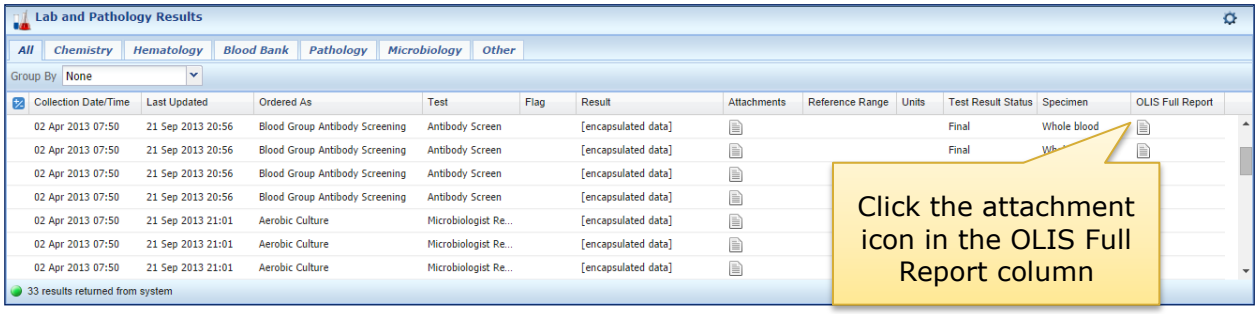


Figure 149: List View, OLIS Full Report Column

2. The Document Viewer will open and display the report for the full order.

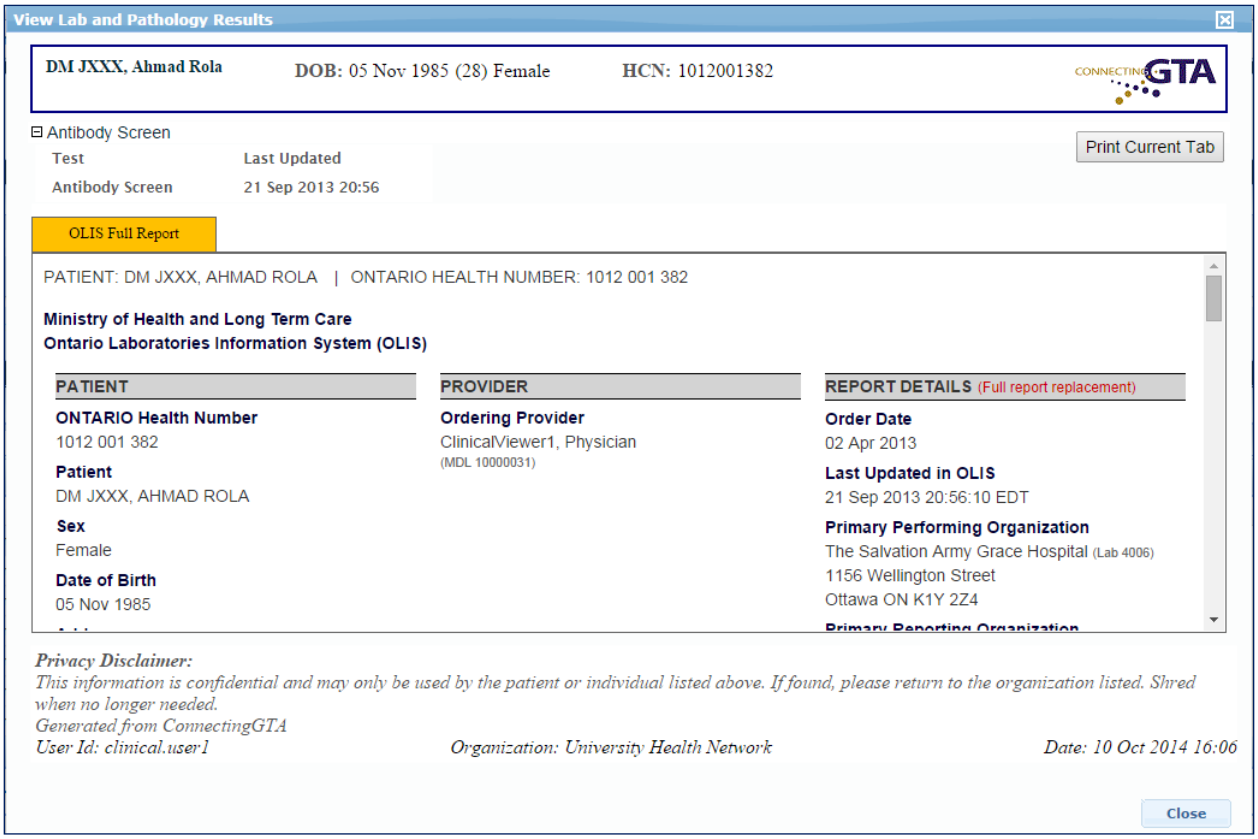


Figure 150: Document Viewer, OLIS Full Report

The report can also be printed from the Document Viewer (Printing from Document Viewer)

To view any attachments that are associated with the OLIS Full Report:

1. Click on the attachment hyperlink found in the body of the report.

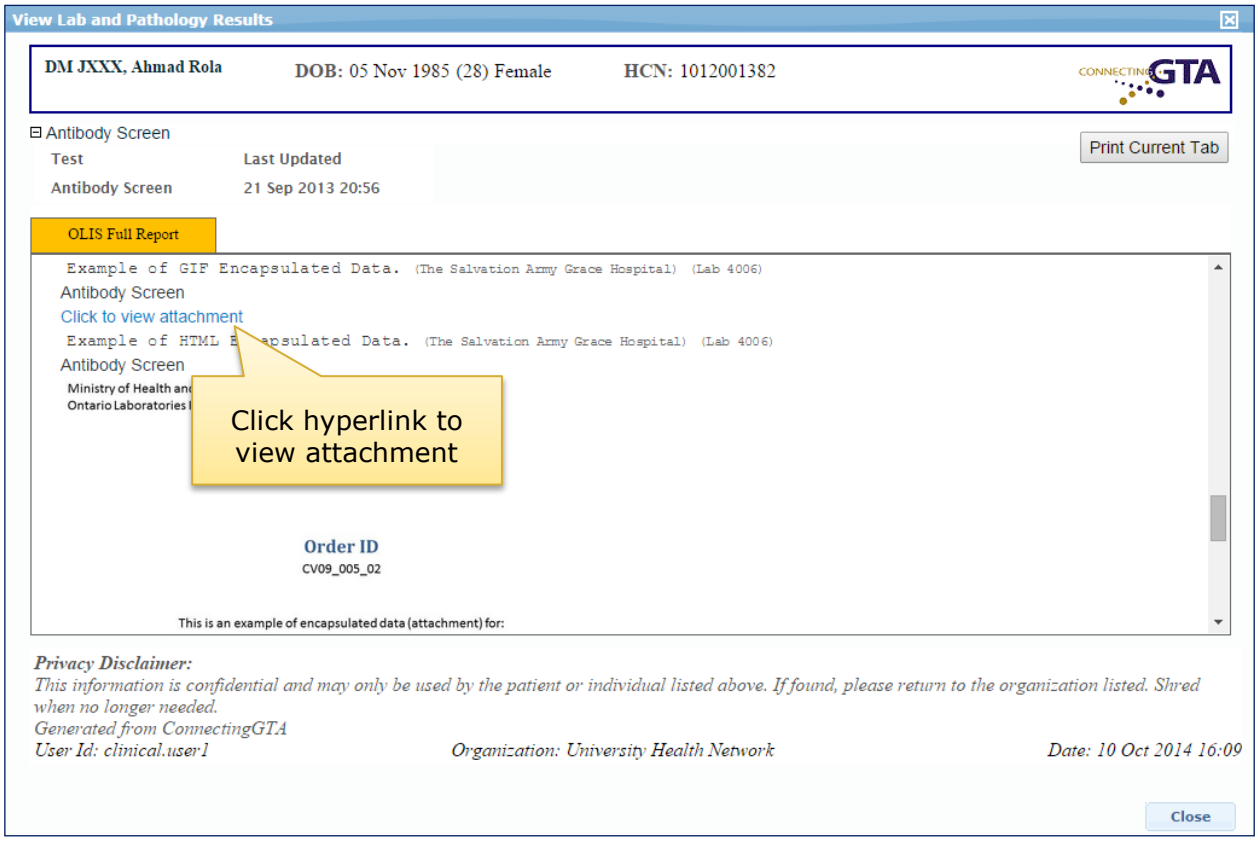

View Lab and Pathology Results
DM JXXX, Ahmad Rola
DOB: 05 Nov 1985 (28) Female
HCN: 1012001382
Antibody Screen
Print Current Tab
Test
Last Updated
Antibody Screen
21 Sep 2013 20:56
OLIS Full Report
Example of GIF Encapsulated Data. (The Salvation Army Grace Hospital) (Lab 4006)
Antibody Screen
Click to view attachment
Example of HTML Encapsulated Data. (The Salvation Army Grace Hospital) (Lab 4006)
Antibody Screen
Click hyperlink to view attachment
Order ID
CV09_005_02
This is an example of encapsulated data (attachment) for:
Privacy Disclaimer:
This information is confidential and may only be used by the patient or individual listed above. If found, please return to the organization listed. Shred when no longer needed.
Generated from ConnectingGTA
User Id: clinical.user1
Organization: University Health Network
Date: 10 Oct 2014 16:09
Close

Figure 151: Document Viewer, OLIS Full Report with Attachment

2. Another tab will open in the Document Viewer, where the attachment will display.

Note: clicking on the same link more than once will result in multiple tabs with the same attachment displayed. The only way to remove these duplicate attachments is to close and re-open the Document Viewer.

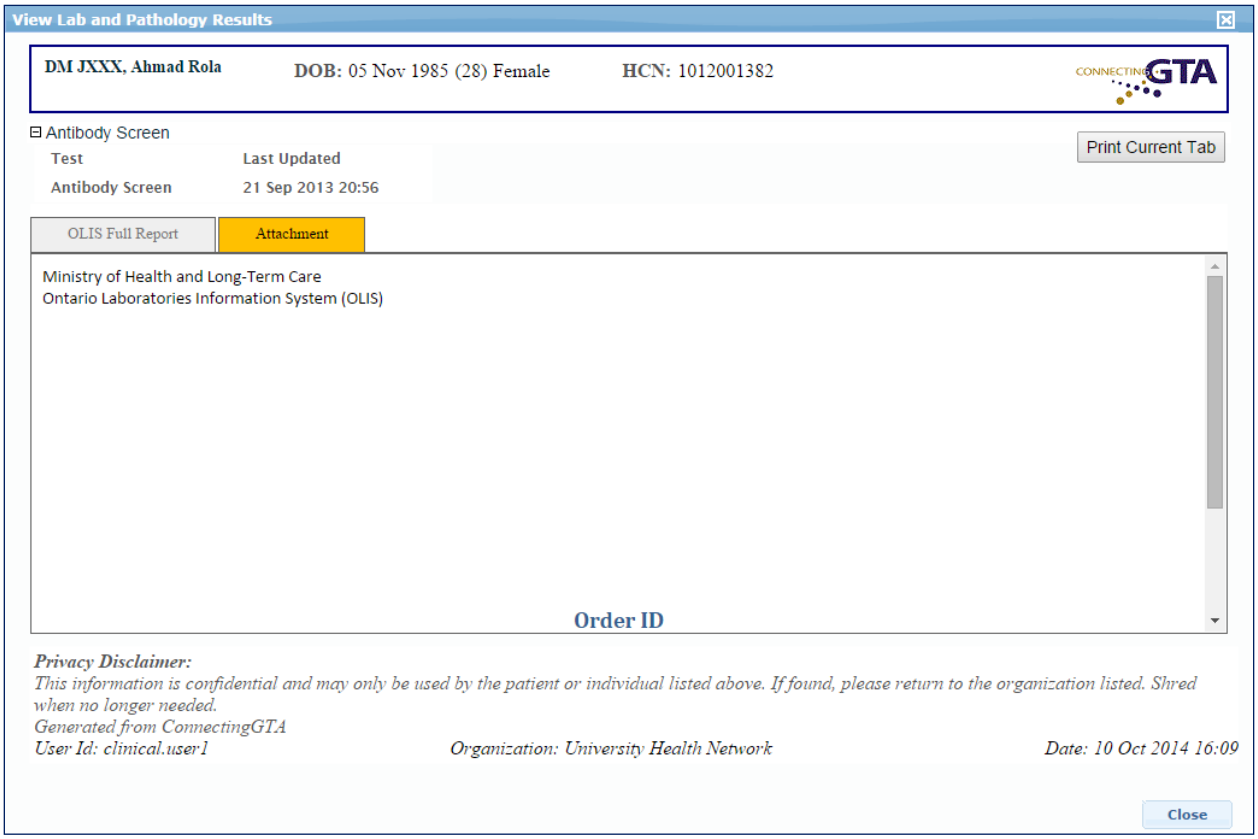

View Lab and Pathology Results
DM JXXX, Ahmad Rola
DOB: 05 Nov 1985 (28) Female
HCN: 1012001382
Antibody Screen
Print Current Tab
Test
Last Updated
Antibody Screen
21 Sep 2013 20:56
OLIS Full Report
Attachment
Ministry of Health and Long-Term Care
Ontario Laboratories Information System (OLIS)
Order ID
Privacy Disclaimer:
This information is confidential and may only be used by the patient or individual listed above. If found, please return to the organization listed. Shred when no longer needed.
Generated from ConnectingGTA
User Id: clinical.user1
Organization: University Health Network
Date: 10 Oct 2014 16:09
Close

Figure 152: Document Viewer, Viewing Attachment

Attachments

To view all the attachments associated with an order:

1. Click on the attachment icon visible in the attachment column of the List View.

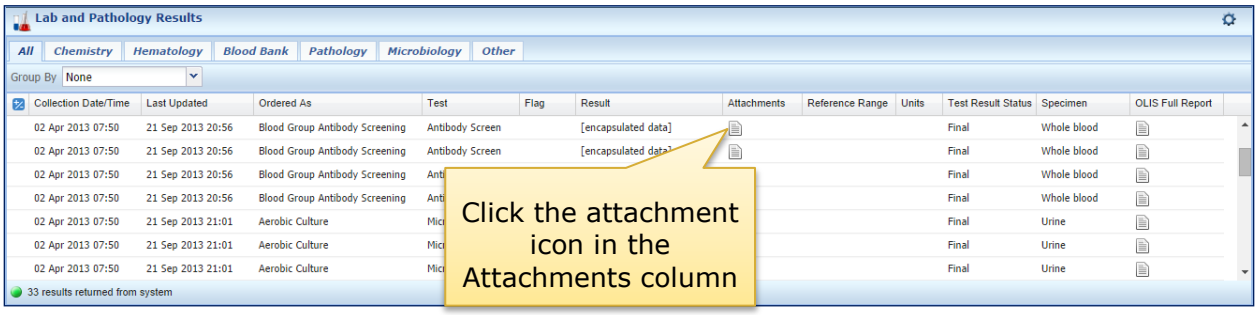


Figure 153: List View, Attachments Column

Alternatively, click on the appropriate links in the OLIS Full Report (as described above in OLIS Full Report View). Attachments are not common for most modalities with the exception of pathology. As noted above, attachments are associated with a particular result (generally in place of a discrete result value).

Personalization of the Lab and Pathology Results Portlet

General Preferences

The portal allows the user to personalize or configure any portlet display. This personalization can be applied in a temporary or permanent manner.

Standard personalization and user preference features are available within the Lab and Pathology Results portlet for each modality (tab).

Note: Due to the complex interaction between variables (e.g., source, units, results, etc.) of the Lab and Pathology data in the portlet, OLIS does not recommend applying personalization to this portlet that might misrepresent the data (e.g., removing columns).

Sorting

There are 2 types of sorting on this portlet. The first is the OLIS defined sort and the second is the user defined sort.

1. Default Sort (OLIS Defined Sort)

   Default Sort is also referred to as the OLIS Defined Sort and is important to keep in mind as you view the data. In order to maintain the sequence in which labs have intended to display their result, the test result data is sorted by default in the following sort order:

Order	Sort Key (Default Mode for OLIS)	Notes
1	Collection date and time, in descending order	Ensures that all tests are sorted by the latest specimen collection date first.
2	OLIS test request sort key	Defined by the laboratory who reported the result. Ensures that the test is sorted in the manner the laboratory believes is clinically important.
3	OLIS test result sort key	Defined by the laboratory who reported the result. Ensures that the test is sorted in the manner the laboratory believes is clinically important.

Table 15: Lab and Pathology Results, Default Sort

2. User Defined Sort

Applying the User Defined Sort, the user can choose to sort by a particular column. Users can sort on any visible column in the Condensed Portlet View or Individual Portlet List View. However, the user can only sort one column at a time.

To apply sorting, refer to Sorting.

Note: Sorting any column in ascending or descending order will re-order the results according the fields' data type (either alphabetical, numerical or date) in an increasing/decreasing direction. Some columns allow sorting based on a limited set of values.

Within the Lab and Pathology Results portlet, data can be sorted by a unique feature called 'Group By' option. Refer to Grouping for details.

Note: Use caution when applying a User Defined Sort. The column header will have an up or down triangle indicating that the column has a sort applied. When an ascending/descending sort is applied, the only way to "unsort" is to refresh the portal or change to a different view.

Grouping

Users can choose to group the display of lab results using a drop down menu in the portlet. The following options are available:

1. None (default display) – lab results are not grouped by any attribute
2. Ordered As (Test Request name) – lab results are grouped together in the order sets, panels or batteries they were ordered
3. Test Name – lab results are grouped together based on test result name.
4. Flag – lab results are grouped together based on flag.

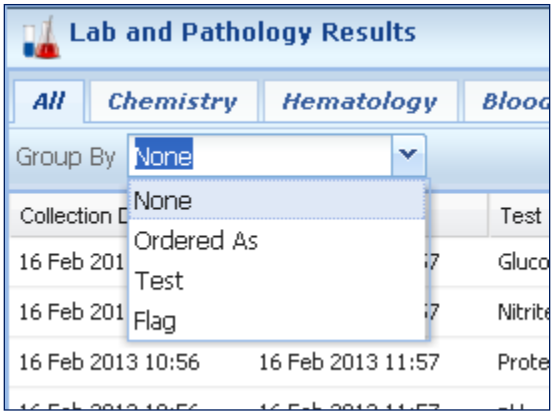


Figure 154: Grouping Options

- If there are abnormal/critical results within the group, a yellow triangle alert appears beside the group header with a tool tip to indicating: "Abnormal/critical results present".
- All groups should be expanded by default. Use the expand/collapse all control to expand and collapse all groups simultaneously.
- When grouping has been enabled, column-level sorting applies to lab results *within* each group. In other words, results will be re-ordered within each group.
- When grouping has been enabled, you can filter for any column that has filter enabled.

- Grouping does not persist between sessions.

Group by Ordered As

Grouping by Ordered As will display the test results by the test request name that they were ordered as at a high level. This option is useful to identify what was ordered. For example, group order as Complete Blood Count (CBC).

Each group header will display the Test Request name, a warning indicator if any results are abnormal, Test Request status, specimen and collection date/time. Note that only tests from the same order are grouped together using this option. As a result, you may see multiple CBC groups as they were ordered separately.

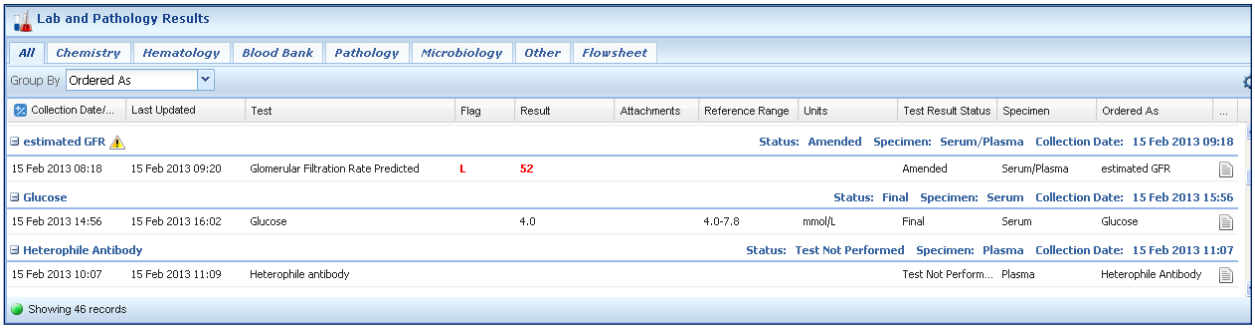


Figure 155: Group by Ordered As

Group by Test Name

Grouping by Test Name will display the test results by name, in alphabetical order.

The group header will display the Test Result name which is an alternative to trending since it shows similar tests grouped together and sorted by date.

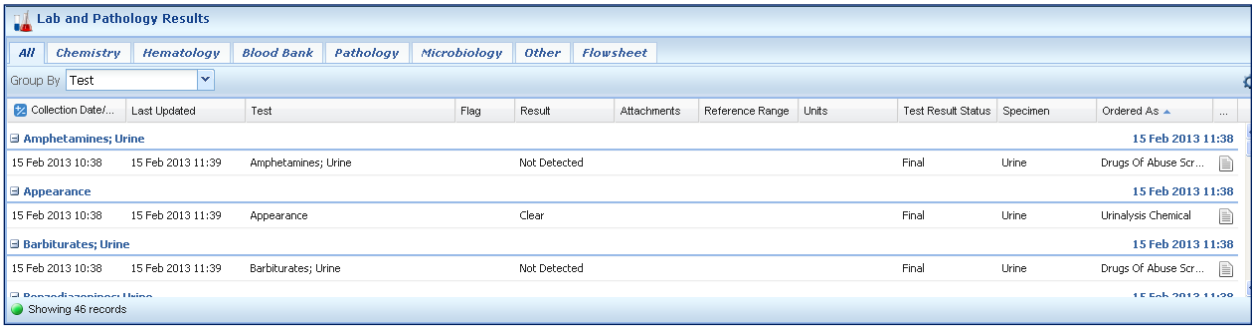


Figure 156: Group by Test Name

Group by Flag

Grouping by Flag will bring all group all tests with the same flag name together. The results with no flags are grouped together in a group of "Non Flagged Results". Groups will be displayed alphabetically by flag name. This is helpful for reviewing all critical high (HH) tests at a glance.

The group header will display the Flag Name.

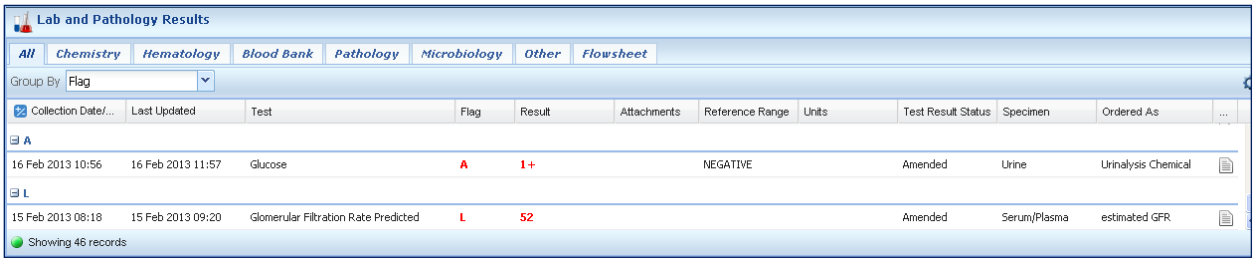


Figure 157: Group by Flag

Note: To return to the default view, users must select the 'None' Group By option.

Filtering

The portlet allows filtering in all the columns visible in the Condensed Portlet View and Individual Portlet Views.

Filters can be applied to one or multiple columns at the same time (e.g., test and Specimen columns). For most columns, applying a filter requires the user to type in free text keywords. The portlet list will apply the filter immediately as the text is entered.

To apply a filter, refer to Filtering (Apply a Filter).

To remove a filter, refer to Filtering (Remove a Filter).

Note: filtering by the "Test" and "Ordered As" columns can result in a dramatic change in the list view displayed. Users must pay close attention when filtering is applied to ensure correct interpretation of the information. Filtering based on these fields can remove important contextual information such as other tests that were ordered together, etc.

User preferences for viewing lab results

Users can set preference for the portlet list using two methods.

A. Adjust preferences directly on the list (Temporary settings)

- Adjust the width of any column (Column Width).
- Hide any non-locked columns from display, this varies based on modality (Hide or Show Columns).

- Sort the list by any column in ascending or descending order (Sorting)
- Filter the list by any column, with the exception of the Attachments and OLIS Full Report columns (Filtering).

Note: Above preferences are not saved after navigating away from the portlet.

B. Personalize the list by clicking on the 'User Preferences' button . (Permanent setting)

- Change which columns are displayed (non-locked columns only, this varies by modality) and the order they are in (Modify Columns)
- Select which column should be used as the default sort (Change Default Sort)
- Reset to system defaults (Reset to System Default)

Note: 'Reset to system default' will not reset the default sort of the Lab and Pathology Results portlet. To do this the user must either refresh the portal (using refresh button in the browser) or navigate away to a different view and return.

Paging

Paging is not employed for this portlet. All data is presented in a single list, use the vertical scroll back to see more data.

Data Availability Indicators

The lab portlet will collect all the data in a single step to ensure that all lab results for the selected time range are displayed in the Lab portlet. The portal provides a status indicator to indicate if all of the results have been returned from a query, if the query is still in progress or if there were errors in retrieving the data. This is at the bottom of the List section.

Please note that when the lab results returned is a large set for the given patient and timeframe the solution in the background is sending multiple requests to OLIS to gather all the relevant data. This results in some data returning faster than others. The solution will display the results as it is received and will continuously sort the data. This process may result in noticeable jumps in the position in the list of a few results until the data collection process is complete.

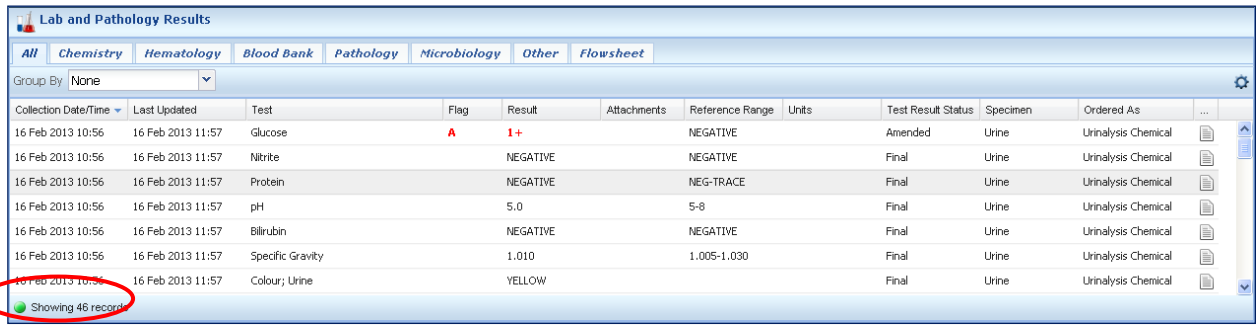

Lab and Pathology Results
All
Chemistry
Hematology
Blood Bank
Pathology
Microbiology
Other
Flowsheet
Group By None
Collection Date/Time
Last Updated
Test
Flag
Result
Attachments
Reference Range
Units
Test Result Status
Specimen
Ordered As
16 Feb 2013 10:56 16 Feb 2013 11:57 Glucose A 1+ NEGATIVE Amended Urine Urinalysis Chemical
16 Feb 2013 10:56 16 Feb 2013 11:57 Nitrite NEGATIVE NEGATIVE Final Urine Urinalysis Chemical
16 Feb 2013 10:56 16 Feb 2013 11:57 Protein NEGATIVE NEG-TRACE Final Urine Urinalysis Chemical
16 Feb 2013 10:56 16 Feb 2013 11:57 pH 5.0 5-8 Final Urine Urinalysis Chemical
16 Feb 2013 10:56 16 Feb 2013 11:57 Bilirubin NEGATIVE NEGATIVE Final Urine Urinalysis Chemical
16 Feb 2013 10:56 16 Feb 2013 11:57 Specific Gravity 1.010 1.005-1.030 Final Urine Urinalysis Chemical
16 Feb 2013 11:57 Colour; Urine YELLOW Final Urine Urinalysis Chemical
Showing 46 records

Figure 158: Data Availability Indicator

The Lab and Pathology portlet has several indicators displayed to the user for easy navigation. For example Status messages, consent warning messages, invalid or abnormal indicators, crossed out record to indicate a lab was cancelled.

State	Description	Tooltip	Icon
Success	The query is complete and all data is currently being displayed.	All data is up to date. Note: no data is coming from the OLIS database. Adjust the timeline to 1 year	
Pending	The query is still in progress.	Retrieving new data. OLIS data is loading	
Error	There was a problem completing the query; not all available data is being displayed.	There was a problem getting new data, refresh your browser. If the problem persists contact your helpdesk. Problem loading OLIS data	

Table 16: Lab and Pathology Results, Status Indicators

If the query has successfully completed, but no data is returned, a 'No results available' message will display at the bottom of the List section.

While the data has partially loaded and is still pending, in addition to the icon, a yellow banner may appear to indicate that more data is pending.

Error Messages

If there is a system issue, an error message will display with an error number and a short descriptive message

System Error Messages
Message: "One or more data sources took too long to respond. Not all results may be shown." **Reason:** Unable to process message
Message: "There was an error accessing the component service. No data is available. Contact the helpdesk." **Reasons:** • SOAP Errors • Unsupported message type • Unable to extract content • Data or identifiers are not valid • Health Card reported lost, stolen, version code is incorrect • Not authorized users • Patient doesn't have OHIP coverage • Patient name, sex, and/or date of birth is not current • Host Processing Error
Message: "Warning: Some or all of the requested laboratory information was not returned due to a patient consent directive". **Reason:** Patient has a consent directive to block his/her records

Table 17: Lab and Pathology Results, System Error Messages

Printing

The OLIS Full Report contains all the relevant information regarding a single lab order (e.g. results, comments, administrative info, etc). This is designed to mimic the paper form of the order result a clinician would typically receive via fax.

Printing in the Lab and Pathology Results portlet uses the Document Viewer and follows OLIS standards. Printing is allowed "only" from the Document Viewer, where the OLIS Full Report and attachments are displayed. The printout will contain two headers OLIS and ConnectingGTA header (DOB and gender fields), footer (Privacy Disclaimer) and body (the report content).

For more detail, refer to Printing from Document Viewer.

Note: Printing of the Lab and Pathology Results list is not available.

Consent Directive

The user may encounter a consent directive when trying to access OLIS information. A consent directive is a block or restriction on access of Personal Health information (PHI) requested by a patient or individual. Temporary access is granted when the clinician chooses to override the consent directive to view Clinical and Laboratory Data. Once an OLIS consent override is in place, the OLIS data access is available temporarily for 4 hours. Once the time frame expires the user will be prompted to override consent and to enter the reason for the override.

Refer to Overriding Consent for details.

OLIS has a consent directive capability which gives patients or their substitute decision maker(s) (SDM) the option to withhold or withdraw his or her consent for the collection, use, and disclosure of all or some of his or her PHI. The patient's OLIS data will remain accessible to authorized health information custodians and their agents, until a consent directive (test-level or patient-level) is applied to the patient's OLIS data.

Patients have the option to apply the following type of consent directives:

1. **Record-level Block:** Restricts access to specific test request(s) for that patient, subject to certain exceptions. For example, a patient has 10 records, but only 5 out of the 10 are blocked.

2. **Patient-level Block:** This is a block-all directive that will restrict access to all OLIS data (Orders and Reports), subject to certain exceptions. For example, if the patient has 10 records, all 10 records are blocked.

Note: all consent directive overrides are monitored by the Privacy Officer for auditing purposes.

Community

The Community portlet displays a list of all community type referrals, including Community Care Access Centre (CCAC) referrals, for the selected patient within the time period selected on the

timeline. Any referral that **started**, **finished**, or is **ongoing** during the selected timeline range will display.

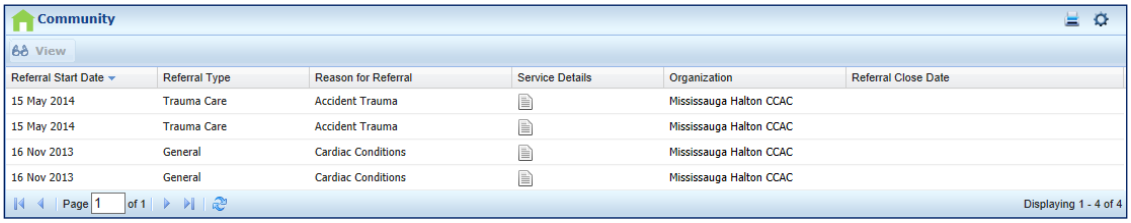


Figure 159: Community Portlet

The standard (default) columns as displayed above are:

Column	Description
Referral Start Date	Referral date to the CCAC
Referral Type	Type of referral (e.g., Long Term Placement, Short Stay Respite, Rehab, etc.)
Reason for Referral	Reason for the referral
Service Details	Attachment icon will display when documents are available for viewing. Click on the "View" icon with the row selected, double click the row, or click directly on the attachment icon to open the Document Viewer with the document of interest displayed (Viewing Documents).
Organization	The facility or organization associated with the referral.
Referral Close Date	End date for the referral. ***Note:*** The presence of a referral close date can indicate that the referral is no longer active.

Table 18: Community Data Elements

Service Details

All community-related documents sent to the portal by sites will be displayed in the Community portlet. This includes documents such as:

- Medical Equipment and Supplies
- Service Details
- Client Risk
- CCAC Referral including long term care service details
- Client Safety Issues

Note: Referral Assessment documents will not be displayed in the Community portlet, this document will be found in the Documents/Notes portlet.

If there are more than 20 documents, a message will be displayed.

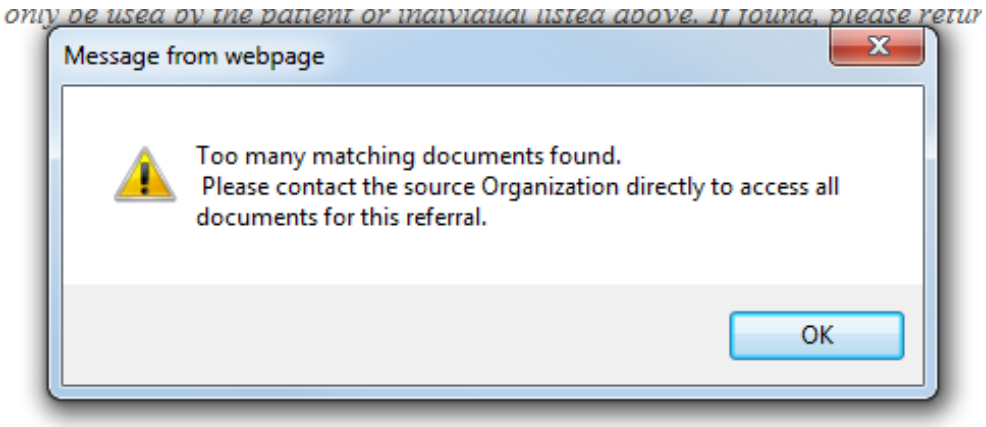

only be used by the patient or individual listed above. If found, please retur
Message from webpage
Too many matching documents found.
Please contact the source Organization directly to access all documents for this referral.
OK

Figure 160: Too many matching documents

Preferences

By default, the Community portlet shows all available columns. Users can set preference for the portlet list using two methods.

A. Adjust preferences directly on the list

- Adjust the width of any column (Column Width).
- Hide any of the columns from the display (Hide or Show Columns).
- Sort the list by any column in ascending or descending order (Sorting)
- Filter the list by the date column (Filtering).

Note: Above preferences are not saved after navigating away from the portlet.

B. Personalize the list by clicking on the 'User Preferences' button .

- Change which columns are displayed and the order they are in (Modify Columns)
- Select which column should be used as the default sort (Change Default Sort)
- Specify the number of data rows to display (Set Content Area Height)

- Reset to system defaults (Reset to System Default)

Note:

- If there are more rows than space available, use paging controls to see more rows or change the default number of rows per page (Paging).
- To print the Community portlet list, click the print icon (Printing from List Views).

Icons

Icon	Name	Description
	Add/Remove Patient	From the patient banner, open a window to add/remove the current patient from a list
Add to...	Add to…	From My Recent Patients list, open a window to add/remove the current patient from a list
	Alert/Warning	Indicates critical data that should be reviewed
	Attachment	Click to open attachment in the Document Viewer
	Calendar	Open the calendar window to select a date
	Comment	There is a comment attached to the item, or the full text is available. To view the comment, hover the pointer over the icon.
	Delete	Remove the patient from My Patients List
	Drop Down	Click to open a menu
	Expand row	Expand the data to show all the rows, or all details.
	Collapse row	Collapse the data to hide the rows, showing only the main or heading row.
	Expand All/Collapse All	Expand or collapse all rows on the component. Click this icon to toggle between showing and hiding the rows.
	Information	Show additional information or notes
	Error	Lab Portlet - There was a problem getting data, refresh your browser. If the problem persists contact your helpdesk.

	Loading	Lab Portlet - Retrieving new data…
	Complete	Lab Portlet - All data is up to date
	Result Comments	Lab Portlet – test result comments available
	First Page	Paging - display the first page of data.
	Previous Page	Paging - display the previous page of data.
	Next Page	Paging - display the next page of data.
	Last Page	Paging - display the last page of data.
	Print	Click to open the print preview window to view and/or print the selected list view.
	Print	Click to open the print preview window to view and/or print attachments from the Document Viewer.
	Refresh	Redisplay the list with current data.
	Search for a patient	Click to open Patient Search and Selection dialog
	Show/Hide	Show more or less data on the patient banner
	Sort Order	Data is sorted on this column in ascending ( ) or descending ( ) order.
	Previous/Next	Timeline - show the previous or next time range on the timeline
	End Point Slider	Timeline - beginning and ending termination point on the timeline
	Today	Timeline - indicator of today's date and time on the timeline
	Inpatient Visit	Timeline – a blue line marks an inpatient visit on the timeline. Click to adjust the timeline to become two weeks before and two weeks after the selected visit.
	Ambulatory Visit	Timeline – marks an ambulatory (outpatient) visit on the timeline. Click to adjust the timeline to become two weeks before and two weeks after the selected visit.
	Emergency	Timeline – marks an ED visit on the timeline.

	Department Visit	Click to adjust the timeline to become two weeks before and two weeks after the selected visit.
	User Preferences (Options)	Click to open Configure My Grid dialog and set user preferences
	View	Click to view patient record in Patient Care tab
	View	Click to view record details
	Visits/Encounters	Icon for the Visits/Encounters and Summary Reports portlet
	Documents/Notes	Icon for the Documents/Notes portlet
	Lab and Pathology Results	Icon for the Lab and Pathology Results portlet
	DI Reports	Icon for the DI Reports portlet
	Other Results	Icon for the Other Results portlet
	Community	Icon for the Community portlet
	Custom View	Icon for any custom view created by the user
	Completed	Patient Search – required field was successfully completed
	Invalid	Patient Search – required field was not completed successfully
	Edit Mode	Navigation bar – click to enter Edit Mode for creating & editing custom views
	View Mode	Navigation bar – click to enter View Mode (from Edit Mode)
	Collapse Patient Data Views	Naviation bar – click to view only icons
	Expand Patient Data Views	Naviation bar – click to view icons and text description